

Library Serials Module V. 2.5 User Manual

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Preface

The Library Serials Module V. 2.5 User Manual has been produced by the Region II Department of Veterans Affairs (VA) Information Resources management (IRM) Field Office, Washington, DC and the Learning Resources Service Expert Panel to provide assistance for all Library Service employees in using the Serials Module. The User Manual provides very detailed instruction in the use of the Serials Module and tries to address the common questions raised by users of the earlier version. It represents a collaboration among a contracted programming house, the Washington IRM Field Office, and the Expert Panel as a method of providing an update to an existing module.

An accompanying Technical Manual has been provided for the local Information Resources Management staff.

Acknowledgments

The development of this version of the Serials Module has been accomplished as a team effort involving Washington, DC IRM Field Office staff member Lee Hirz, Development Manager; Sentient Inc. programmer Arlis Acord, and Learning Resources Service Expert Panel members Maureen Farmer, Milwaukee, WI, chairman; Wendy Carter, Director of Library Programs, VACO Learning Resources Service, Washington, DC; Nancy Clark, Dallas, TX; Melda Page, Togus, ME; Barbara Schultz, Perry Point, MD; and Carol Sistrunk, Jackson, MS.

This new version of the Serials Control Module has been extensively tested in the Library Services of the VA Medical Centers at Perry Point, MD; Dallas, TX; Cheyenne, WY; Lake City, FL; CO Library, Washington, DC; Togus, ME; Lebanon, PA; Fort Wayne, IN; and Kansas City, MO. The local IRM site managers, their staffs, and the local Library Service staffs all deserve many thanks for their time and effort in helping with the development and testing of this Module.

Introduction

VA libraries spend a large portion of their materials budgets on serials such as medical journals. Each library has more than 100 active subscriptions and retrospective holdings for over 1000 titles is not unusual. The efficient management of these collections in terms of time and money is very important.

The Serials Module provides automation of the data needed to manage these collections, exact bibliographic identification of the item; data on costs, vendors, numbers of copies; the ability to assign routings to titles and generate the routing slips automatically; a two-key check-in process to speed up the daily workload; and numerous reports for claims, holdings lists, and statistics.

Journal and magazine titles tend to change name and frequency very often. A major problem with V. 1.2 was the inability to keep current the database forming the bibliographic record of the serials titles at the local site. For sharing purposes, it is also important that all libraries use the same form of a serials title.

The significant effort in V. 2.5 has been to devise a method to keep the bibliographic database at the local site always up-to-date. This has been accomplished by linking a similar, constantly edited file on FORUM to the local site modules via network mail. When a change is made in a title record at the FORUM level, it can be downloaded to the local level, where it will overwrite the old bibliographic record without altering any of the specific local data such as holdings or check-in information. Downloaded records will also carry predication patterns as they are added or modified. Prediction patterns significantly speed up the daily check-in process.

These major changes in functionality are concentrated in Section E - LTS - Library Title Setup. This chapter should be studied carefully.

Other changes in functionality are found in the following sections.

Section P - HSF - Hospital Service file where the ability to edit this file has been removed.

Section S - CHE - Check-In with information about the predicting ability and the effect of the initialization process on titles.

This User Manual for V. 2.5 is far more extensive than its predecessor. Every effort has been made to include all the supplemental frames and tips from the earlier version as well as answers to frequently asked questions and segments from the IADATS training sessions and tapes.

The main part of this User Manual is organized in sections that parallel the option structure in the Serials Module itself. Each option is a separate section.

Package Management

Library Package on FORUM

The FORUM module of the Library package serves several major needs.

- Maintain basic serial information
- Allow for interlibrary loan of materials
- Maintain listing of networked audiovisuals

First, the programs on FORUM allow the National Librarians to input and maintain consistent information on serials. Serial titles are entered specifying certain pertinent information about the serial such as title, frequency of issue, etc. Once the serial has been entered into the Library module on FORUM, the local medical center libraries have the capability of obtaining that information by requesting information about serial titles to be transmitted to their local files for utilization.

The second feature of the Library on FORUM is the ability to request interlibrary loan of materials from one local medical center to another. Holdings for each library station are maintained on FORUM for this purpose and for updating the National Library of Medicine's SERHOLD data for their interlibrary loan module, DOCLINE.

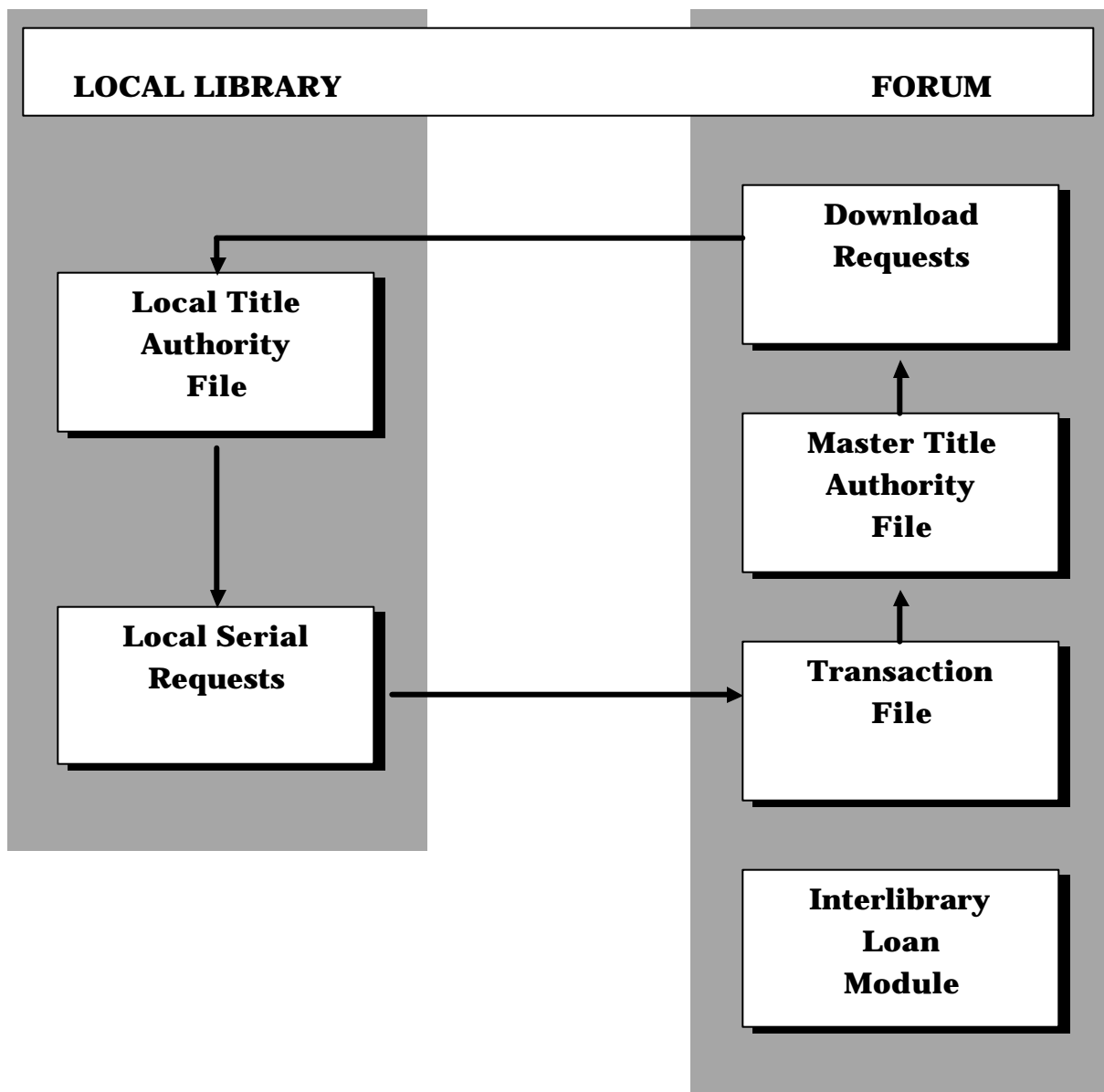
Library Package at Local VAMCs

The Library package module at local VA Medical Centers serves several major needs; checking in serials, maintaining local holding records, and renewal of serials material.

Integration

A new functionality in Library V. 2.5 is the transmission of Library information from the master files on FORUM to the local library station and information from the local library station to FORUM. At this time, only serial and associated information are transmitted from one component to another.

Functional Components



File Information

The National Librarians in Togus, ME provide the entries made in the five main Library files (file #680.1 Publisher; file #680.2 Frequency; file #680.5, Title Authority; file #680.8, Indexing Sources; and file # 680.9, Prediction Pattern. The files that are maintained by the VA Medical Centers are file #680, Local Serials; file #681, Library Disposition, and file #682, Library Issue. Other files maintained by the VA Medical Centers are file #680.3, Subject, file #680.4, Name, and file #680.6, Library Site Parameters. A temporary file, file #682.1, Library Transactions, will fluctuate the most, depending on the amount of download requests and local serial title entries.

Recommended Equipment

This is the basic equipment needed for a library station. Other equipment may also be needed depending upon the size and number of the library department.

- 1 CRT for the Chief Librarian
- 1 CRT for Patron Access
- 1 CRT for the Serial Technician
- 1 Dot Matrix Printer (for printing routing slips, reports, etc.)

Default Printers

There is one default printer location associated with the Library package. This printer will be associated with a device number on your system. You may be able to use the same printer for multiple types of outputs (e.g., routing slips and reports).

Menu Diagrams

Menu Diagram for LBRY MANAGER

Library Management

GLP General Library Package Information

LSM Serials Management

SET Serial Titles

LTS Library Title Setup

CSE Copy Specific Edit

HOL Holdings Setup

PIE Purchasing Information Edit

LSF Library Supporting Files

NME Name Entries

IPL Item Placement Location Entries

SUB Subject Setup

PUR PURGE Journal Date/s from a Title

RST Remove Serial Title from Database

SER Serials Control

SCI General Serials Control Information

CHE Check-in

RET Return from Routing

HIS History of Check-in

RRS Reprint Routing Slips

STR Serial Titles Reports

MIL Missing Issue Lists

AST All Serial Titles

LOC Local Titles by Location

VEN Local Titles by Vendor

MFT Local Microfilm Titles

MED Local Medical Titles

PAT Local Patient Titles

ADM Local Administrative Titles

DON Local Donor Titles

NLT New Local Titles

MSC Medical Subscriptions with Cost

PSC Local Patient Subscriptions

OSR	Other Serial Reports
DFR	Titles Due for Renewal
GAP	Local Gaps List
ORR	Outstanding Routed to Return Issues
REC	List of Recipients
TUL	Titles by Union Lists
FYI	For-your-information Titles
ATR	Administrative Titles with Recipients
MSR	Library Monthly Statistical Report
LSP	Library Site Parameters
MCF	Medical Center Files
HSF	Hospital Service File

Menu Diagram for SER MAIN MENU

GLP	General Serials Control Information
CHE	Check-in
RET	Return from Routing
HIS	History of Check-in
RRS	Reprint Routing Slips
STR	Serial Titles Reports
MIL	Missing Issue Lists
AST	All Serial Titles
LOC	Local Titles by Location
VEN	Local Titles by Vendor
MFT	Local Microfilm Titles
MED	Local Medical Titles
PAT	Local Patient Titles
ADM	Local Administrative Titles
DON	Local Donor Titles
NLT	New Local Titles
MSC	Medical Subscriptions with Cost
PSC	Local Patient Subscriptions
OSR	Other Serial Reports
DFR	Titles Due for Renewal
GAP	Local Gaps List
ORR	Outstanding Routed to Return Issues
REC	List of Recipients
TUL	Titles by Union Lists
FYI	For-your-information Titles
ATR	Administrative Titles with Recipients
MSR	Library Monthly Statistical Report

Menu Diagram for PATRON OPTIONS

PLR	Patron Requests for the Local Library
RFP	Reports for Patrons
PLH	History of Check-in
JTA	Journal Title Availability Inquiry
SLJ	Subject List of Journals Available

Section A - GLP - General Library Package Information

Because the management of serials is a complex operation, this Serials Module is NOT simple. A large number of Help Frames have been written for this Module. Some of them contain general information while most of them are sequenced to explain very detailed Module functions.

To simplify data input and retrieval, we recommend that you input all data throughout the Module in ALL CAPITAL LETTERS.

Assistance in the use of this Module is available in several forms.

- Help Prompts
- Help Frames
- This user manual
- A CAI program for Windows-based PCs concerning the new links between the local module and FORUM
- Advice and trouble-shooting by Library Expert Panel members

Help Prompts

Help Prompts are short statements of explanation available by entering a **?** at each prompt. For example, at the field INACTIVE, type a **?** to pull up a short explanation of what this field means or requires.

Help Frames

Help Frames are a method of extended online help. You see them by typing in **?XXX** at the menu listing that option, where XXX is the 3-letter code for that option. For example, to read the frames for the Missing Issues List report, input **?MIL** when you are at Serials Titles Reports (STR) option prompt.

- The Help Frames form a very large flow chart. Key words to lead you from one frame to another are either enclosed in brackets or highlighted in reverse video on your screen, depending on your terminal type and choice.
- A **?** at the "Select HELP SYSTEM action or <return>" prompt will give you a list of all the HELP SYSTEM commands. They are all preceded by the ^ symbol.

- If you are in a sequence of frames, you may exit from them in two ways: by "backing out" using the RETURN as many times as necessary (which may be tedious or confusing if the sequence is lengthy) **or** by using the ^Q command to quit.
- Frames which present examples of actual screens use < > to surround the characters the user inputs. For example, <RET> means that the return key is pressed.

Expert Panel Members

Library Expert Panel (EP) members are available to provide help. Please do not hesitate to call an EP member for assistance with any part of this Module. They are also very eager to receive suggestions, comments, criticisms, and questions about it at any time. EP members are:

Nancy Clark, Dallas
 Maureen Farmer, Milwaukee
 Melda Page, Togus
 Barbara Schultz, Perry Point
 Carol Sistrunk, Jackson
 Kerry Skidmore, Cheyenne

Serials Module Abbreviations

Listed below, in alphabetical order, are the 3-letter abbreviations for options used in the Serials Module. You will need to become familiar with most of these three-letter abbreviations because you will use them to move quickly through the Module.

ADM Local Administrative Titles (report)
 AST All Serials Titles (report)
 ATR Administrative Titles with Recipients (report)
 CHE Check-In
 CSE Copy Specific Edit
 DFR Title Due for Renewal (report)
 DON Local Donor Title (report)
 FYI For-Your-Information Titles (report)
 GAP Local Gaps List (report)
 GLP General Library Package Information
 HIS History of Check-in
 HOL Holdings Setup

HSF	Hospital Service File
IPL	Item Placement Location Entries
LOC	Local Titles by Location (report)
LSF	Library Supporting Files
LSM	Serials Management
LSP	Library Site Parameters
LTS	Library Title Setup
MCF	Medical Center Files
MED	Local Medical Titles (report)
MFT	Local Microfilm Titles (report)
MIL	Missing Issues List (report)
MSC	Medical Subscriptions with Cost (report)
MSR	Library Monthly Statistical Report
NLT	New Local Titles (report)
NME	Name Entries
ORR	Outstanding Routed to Return Titles (report)
OSR	Other Serials Reports
PAT	Local Patient Titles (report)
PIE	Purchasing Information Edit
PSC	Local Patient Subscriptions (report)
PUR	Purge Journal Date/s from a Title
REC	List of Recipients (report)
RRS	Reprint Routing Slips
RST	Remove Serial Title from Database
SCI	General Serials Control Information
SER	Serials Control
SET	Serial Title
STR	Serials Titles Reports
SUB	Subject Setup
TAF	Title Authority File
TUL	Titles by Union Lists (report)
VEN	Local Titles by Vendor (report)

FileMan Terms and Conventions

It is important to remember certain FileMan terms and conventions to make efficient and effective use of this Module.

JUMP MARK - ^

The JUMP MARK ^ can be used in several ways.

- (The JUMP MARK ^ used alone takes you back one menu level at a time. There may be a sequence of prompts in some sections where you do not need to input any answers, for example, perhaps the last 3 out of a series of 8 prompts. You may enter ^<**RET**> at the sixth prompt to go to the top for the next title; thus you will not waste time returning through prompts you don't plan to use just then.
- The ^ used with a field name allows you to skip directly forward or backward to that field prompt within an option.
- There are some places in the Serials Module where the use of the ^ is not allowed. The system will tell you when it will not accept it.
- The ^ can be used with any 3-letter option code at any "Select Option" prompt to move quickly from one part of the Module to another.
- A double JUMP MARK ^^ allows you to “rubber band” from the option where you are working to another option and then return back to the original option/prompt.

SPACE BAR RETURN

Using **SPACE BAR<RET>** at any option will pull up the title which you were just using. For example, if you were editing copy data for JAMA in Copy Specific Edit (CSE) option (Section F) and then went to Check-In (CHE) option (Section S), **space bar<RET>** at the "Select TITLE" prompt in Check-In (CHE) option (Section S) will pull up JAMA. This feature also works within options.

EDITING

In FileMan terminology, EDITING means changing or altering data already entered. It does not mean deleting data altogether, leaving the field empty. There are some places where data may be either EDITED or DELETED. There are other places where data may be EDITED only, not DELETED. The system will tell you which actions are appropriate.

DELETE MARK - @

The @ DELETE MARK will delete a line of data previously entered. As a safeguard the system will always ask if you really want to delete the data. There are certain places in the Module where the system will not allow the use of the @. This is because the field at that point is tied to other parts of the Module and deletion there would cause errors in the system. However, editing can be done at these spots.

QUEUING

QUEUING is a method of ordering a delayed printout from your printer. To do this, at the "DEVICE" prompt, enter the letter **Q** to pull up QUEUE TO PRINT ON. The system will prompt for "DEVICE" again. This time input your printer device number or name. It will also prompt for the "RIGHT MARGIN"; input as usual. The next prompt is "REQUEST TIME TO PRINT"; input a time or date/time which will print the report at a low-use period. Use the **?** at this prompt to see various methods of inputting times.

Printing long lists can make the local system slow down considerably. For this reason, many local site managers prefer to have reports which are not urgently needed queued to print out during off hours. An additional asset of queuing is that your terminal will be "free" to allow you to continue working.

DEFAULT MARKS - //

FileMan uses the // marks to indicate that anything immediately to the left of those marks is the DEFAULT choice. At that point, if the data is satisfactory, it can be accepted with just a **<RET>**. If the data is not correct, simply enter replacement data to the right of the double slashes //, then the **<RET>**, and the new data will be substituted for the old.

REPLACE/WITH

The "REPLACE...WITH" function is used in FileMan to allow the correction or substitution of data in entries which are longer than 20 characters. If the field can be edited and is over 20 characters long, it presents as:

```
NAME:  BUILDING MANAGEMENT SERVICE  Replace
```

The system allows fragmented replacement so that editing would appear as follows:

```
NAME:      BUILDING  MANAGEMENT  SERVICE  Replace  BUILDING<RET>  With
ENVIRONMENTAL<RET> Replace<RET>
```

The system will then redisplay:

```
ENVIRONMENTAL MANAGEMENT SERVICE
```

ID NUM

In the Serials Module, and especially in the Serials Control (SER) options (Section Q), ID NUM is used to identify and sequentially or chronologically number items in a list. This is always used for all the issue dates listed under a specific title and appears in the left-hand column. It is also used in Copy Specific Edit (CSE) option (Section F) to identify and list the copies designated for any one title. When ID NUM is used in a display, the "Choose ID NUM" prompt means that the number assigned to the item is to be used to pull up that line item for further action.

HALTING

The fastest way to completely exit the computer system and close down your terminal is to back up to the nearest "Select XXXX Option" prompt and enter **HAL** for the word HALT. For example,

```
Select Serials Control Option:  HAL<RET>
```

Find a Title

In most of the options of the Serials Module, you need to find or "pull up" a title as the first action. There are a number of ways that this can be done. Some are better than others. It is recommended that you use one of these three methods.

- entering a significant word or word fragment
- entering the ISSN or ISBN
- entering the NLM title abbreviation

It is also possible to pull up a title by using the first few words of the title, for example, ARCHIVES OF GENER, truncating from the right.

Order of Functions

Certain functions in this Serials Module either must or should be done before others.

It is vitally important that you verify the functions in Library Site Parameters (LSP) option (Section B) before proceeding with any other parts of this Module. Library Site Parameters (LSP) (Section B) initializes the Module for your library. Be sure to confer with your IRM Manager about this option and also be sure to study the manual section for this option.

To use the Serials Module only for basic check-in, you must first create your active titles in Library Title Setup (LTS) option (Section E) and Copy Specific Edit (CSE) option (Section F). They will then be ready for the functions under Serials Control (SER) option (Section Q), of which the primary one is Check-In (CHE) option (Section S). Thus, you should use the options in the following order.

LSP	Library Site Parameters (Section B)
HSF	Hospital Service File (Section P)
IPL	Item Placement Location Entries (Section K)
LTS	Library Title Setup (Section E)
CSE	Copy Specific Edit (Section F)
CHE	Check-In (Section S)

Setting up the Module for check-in will also allow routing and the use of these reports.

MIL	Missing Issue List (Section X)
ADM	Local Administrative Titles (Section AE)
DON	Local Donor Titles (Section AF)
NLT	New Local Titles (Section AG)
ORR	Outstanding Routed To Return Issues (Section AM)
REC	List of Recipients (Section AN)
FYI	For-Your-Information Titles (Section AP)
ATR	Administrative Titles With Recipients (Section AQ)
MSR	Library Monthly Statistical Report (Section AR)

You may wish to go back at a later date to Subject Setup (SUB) option (Section L), Holdings Setup (HOL) option (Section G), and Purchasing Information Edit (PIE) option (Section H) to input the data requested there for both active and inactive titles. Many of the list-type reports are dependent on data from Holdings Setup (HOL) option (Section G) and Purchasing Information Edit (PIE) option (Section H).

Section B - LSP - Library Site Parameters

IMPORTANT: This option provides for the set-up of basic information about the library and must be completed before other files are created. Access to this option should be limited to the Chief, Library Service or designee who initially defines the parameters.

The Library Site Parameters option allows the set-up of site characteristics, such as site name, default vendor, and printer number. Once you do it, you probably won't have to do much to it ever again.

The local IRM Manager, in consultation with the Chief, Library Service, will have created the initial Library Site Parameters data. You may wish to review or edit the data in these fields. You need to pick a name for your library. If you are a one library medical center you may just want to use the name of your station. If you have several different libraries or if you are a multi-division site, you may want to set up several library site parameters, one for each library.

If the parameters have not been created for all the library locations at facilities with multiple libraries by the local IRM Manager, you must use Library Site Parameters (LSP) option to enter the name and data for those locations.

At the "Select LIBRARY SITE PARAMETERS LIBRARY SITE NAME" prompt, enter the already established local library site name or add a new one. The system will ask the following fields.

LIBRARY SITE NAME

This will redisplay the name entered above and allow editing of the LIBRARY SITE NAME entry. Deletion is not allowed.

MULTI-DIVISION SITE: N//

Enter **YES<RET>** only if there is more than one separate division, such as exists in St. Louis. Otherwise, accept the default of NO. If YES, you will see the DIVISION SITE NAME field. If you are not a multi-division site, accept the NO default and you won't see DIVISION SITE NAME.

The program does not work well at multiple sites. A patch is planned in the near future to correct the program so that it will function properly at multi-divisional sites.

DEFAULT VENDOR: READMORE//

This should be a default to your current periodical procurement contractor. A different vendor should be inserted whenever the periodical procurement contractor changes. The vendor listed here will appear automatically as the default vendor at the VENDOR field in Copy Specific Edit (CSE) option (see Section F) for each copy. Any vendor entered here must already be an entry in the A&MM Vendor file. This is not a multiple field.

Before you can enter a default vendor here, the station's Vendor file must be tied into your Serials Module. The Serials Module will not work without the station Vendor file associated with it. The station Vendor file is probably under the control of your Acquisition and Materiel Management Service. Your IRM will arrange with A&MM to get the station Vendor file linked to your Serials Module, and once that link is accomplished, you will need to negotiate with A&MM to establish all the entries in the Vendor file that you will need for any vendors that you may be using in the Serials Module. For example, if you're using READMORE, READMORE's name and address has to be an entry in the station's Vendor file. Your A&MM service may desire to make all those entries themselves so as to maintain the integrity of their file and to keep it clean without unnecessary near duplications in it. In that case, you may have to give them a list of all the vendors that you want, and they will do the data entry for you. Alternatively, they may decide to give you enter/edit access to their Vendor file and instructions on how to make the entries according to their own conventions. These entries should include your primary vendor, which is the one with which you have most of your subscriptions, as well as any vendors you may use less frequently for individual subscriptions. The primary vendor should be identified here as the default vendor. The default vendor will appear at the VENDOR field of the Copy specific Edit (CSE) option (Section F) whenever you set up an individual title. You will not have to enter a vendor name for the majority of titles you create.

However, if you change the default vendor from one year to the next, the action of changing the default vendor in this field in Library Site Parameters (LSP) option will not change the entry for the default vendor in Copy specific Edit (CSE) option (Section F) for all the titles already assigned in previous years. You will have to enter Copy Specific Edit (CSE) option (Section F) for each title and make that change for each copy. We hope to include a remedy for this in the next version. However, if you add new titles after the new default vendor has been assigned, those new titles will automatically have the new default vendor in Copy Specific Edit (CSE) option (Section F).

AUTOMATIC QUEUING

Required field. A YES answer will automatically generate routing slips as the issues are checked in, if the issue was designated for routing in Copy Specific Edit (CSE) option (Section F).

If you have a separately ported printer associated with your Serials Module, either in the library or in a nearby office down the hall, then you will answer this automatic queuing question with a YES. In the next field, ROUTING SLIP PRINTER, you will enter either the name or the number of that particular printer. The Module was made to be used with a separately ported printer. A separately ported printer is a printer which is a separate device wired by itself to your local system. It is not a slaved printer off your terminal.

The Module works better and faster with a separately ported printer. For instance, when you check in journal issues that have routing slips associated with them, the routing slip will print off a separately ported printer within a couple of seconds after you finish the check-in of that particular journal issue.

Most of the reports are variations of holdings and can be very lengthy. They should be queued to print after normal business hours. Using a slaved printer to print such reports would tie up your local system unduly, and would require you to enter a **<RET>** for each page of the reports.

You may use a slaved printer if nothing else is available. If so, at the AUTOMATIC QUEUING field, answer with a NO. At the ROUTING SLIP PRINTER field, use the delete mark @ to delete any printer names or numbers that are entered in the field, leaving that field blank. If there was nothing there, leave it blank. The module can work this way but it will slow you down. With a NO in the AUTOMATIC QUEUING field, you will see each routing slip display across your check-in screen, and you will have to capture that on your slaved printer by toggling your printer on and off in order to print that routing slip.

A NO response may be temporarily appropriate if you are entering considerable retrospective check-in data. This will disable the automatic generation of routing slips for previously routed issues.

ROUTING SLIP PRINTER

Enter the device number or name for a local printer. This number or name is assigned by the local site manager for the printer port.

Section C - LSM - Serials Management

The Serials Management (LSM) menu provides for the following.

- The creation of the local serials database for holdings and purchasing information and current check-in using the Serials Titles (SET) menu (Section D).
- The establishment of related or supporting files using the Library Supporting Files (LSF) menu (Section I) and Medical Center Files (MCF) menu (Section O).
- The use of the Purge Journal Date/s from a Title (PUR) option (Section M) to delete unneeded or erroneous issues.
- The procedures for removing a serials title record from the database through utilization of the Remove Serial Title from Database (RST) option (Section N).

The Hospital Service File (HSF) option (Section P), MUST be established before any of the other functions in this option can be utilized. This file will already exist as an independent file at the facility. You will need to coordinate with your IRM to ensure that it is linked to your Serials Module. This function is reached through the MCF option.

You would next establish Library Supporting Files Using the LSF menu options (Sections I-N).

Section D - SET - Serials Titles

Use the options on this menu to establish your local database of titles. After the title record is established, you can use the record for the check-in options on the Serials Control (SER) menu (Section Q) as well as for reports and statistics.

This option contains the following.

- Library Title Setup (LTS) option (Section E), for (1) adding a title that is new to the local database using the download option from FORUM (see Section E), or (2) adding a title yourself in the Library Title Setup (LTS) option (Section E), which will be automatically transmitted to the FORUM editors for confirmation and/or addition to the national Title Authority file. The national Title Authority file, in effect, is the online ULP-BIB in the Library ULP Reports option (see Section E) on FORUM.
- Copy Specific Edit (CSE) option (Section F), for entering information for each copy of the title, including routing slip creation when appropriate.
- Holdings Setup (HOL) option (Section G), for entering holdings data about a title.
- Purchasing Information Edit (PIE) option (Section H), for entering cost and subscription information about a title.

Section E - LTS - Library Title Setup

The Library Title Setup option is used to add a serials title record to the local serials database. Bibliographic information is either entered by you or downloaded from FORUM. Each title must be entered here before you can use Serials Control (SER) menu (Section Q), Holdings Setup (HOL) option (Section G), and Purchasing Information Edit (PIE) option (Section H).

If you have been using the earlier version of the Serials Module, V. 1.2, the initialization process for this version will eliminate most of the unused title records from the original, locally mounted Title Authority file. Title records, which may be linked to your active local titles as "formerly" or "continued by" titles, will remain in your local serials database. This initialization process will not destroy any title records or information associated with them which you are actively using in terms of check-in, holdings, etc., at the time of initialization.

After initialization has taken place, you may receive two types of automatic messages. One message will list the titles from your old local system which the initialization process could not overwrite. This list could be very short to very long. The system will automatically transmit these titles to the database editors on FORUM to process. Corrected versions of these title records will be automatically sent back to you within a few days and inserted into your database. Except for rejected titles, you do not have to take any action concerning the titles on this list. However, you may wish to retain the list for a few weeks to check on the progress of the database editors. As the database editors work through these records, you probably will get messages from FORUM. An example of the first message upon initialization follows.

Subj: TITLE MATCH NOT FOUND [#1821920] 14 APR 94
From: ALBERT, CAROLYN - COMPUTER SPECIALIST

The following titles were not matched to the Corrected Title Authority File:

AMERICAN JOURNAL OF ROENTGENOLOGY
TALKING BOOK TOPICS
NAHSL NEWSLETTER

You will receive the following types of messages when these corrected records are being sent back to you.

Subj: TRANSACTION RECEIVED FROM FORUM [#1832217]
From: FORUM LIBRARIANS in 'IN' basket.

A CORRECTED TITLE RECORD for the following title
now: DIAGNOSTIC MOLECULAR PATHOLOGY was: AMERICAN JOURNAL OF
SURGICAL PATHOLOGY. PART B, DIAGNOSTIC MOLECULAR PATHOLOGY
has been transmitted to you. It is being processed and should be available in
your Library Title Setup (LTS) option within 24 hours.

Subj: TRANSACTION RECEIVED FROM FORUM [#1832218]
From: FORUM LIBRARIANS in 'IN' basket.

A CORRECTED TITLE RECORD for the following title
now: ADVANCES IN WOUND CARE was: ADVANCES IN WOUND CARE
has been transmitted to you. It is being processed and should be available in
your Library Title Setup (LTS) option within 24 hours.

The second message will list title records for which the initialization process could not find matches in the INDEXING SOURCES, PUBLISHER, or FREQUENCY fields. From this list, identify the titles which you own, and select each one of these in Library Title Setup (LTS) option. If any of the fields in a title record have an * after the entry, there is a discrepancy between what is in your database and in the national TAF file. Use the ? at the field with the asterisk to display the choice of entries and then select the correct entry to replace the previous entry which is incorrect. You may also request a download of the record from FORUM, or you may just ignore these differences. An example of the second message follows.

Subj: RECORDS NOT CONVERTED [#1821921] 14 APR 94
From: ALBERT, CAROLYN - COMPUTER SPECIALIST

The following information was not converted during national files update.
You may correct by download if national title or in LTS if local title.
LOCAL Title: HEALTHNET Publisher: UCONN HEALTH CENTER*
LOCAL Title: NAHSL NEWSLETTER Publisher: UCONN HEALTH CENTER*
LOCAL Title: PHARMACY SERVICE NEWSLETTER Publisher: PHARMACY SERVICE VA
TOGUS*

If you have not previously used the Serials Module, you can do so without having to load the old version first. You will simply download to yourself from FORUM each title which you need to have to establish your database.

The underlying structure of the Serials Module is based on a national Title Authority file which is the foundation of the VA Union List of Periodicals (ULP) on FORUM, called the Library ULP Reports Option. This file is maintained by editors in Learning Resources Service at the Togus, ME VAMC. The major improvement for V. 2.5 is the addition of links from the bibliographic record in the online ULP-BIB file to the local Serials Module. New records and changes in records can be sent from FORUM to the local module, as well as the reverse, overnight through network mail. It includes a messaging function that notifies serials module users when a new title which includes a FORMERLY title in it has been added to the online ULP-BIB file, or when a title previously there has been edited to alter it in the FORMERLY, CONTINUED BY, PREDICTION PATTERN, FREQUENCY, or LAST ISSUE DATE fields. Thus users of the local serials module will receive messages notifying them that certain new titles have been added or certain "old" titles have been edited. For example:

Subj: NEW SERIAL TITLES ADDED [#XXXXXXX] 03 JAN 94 20:00 EST 11 Lines
From: <POSTMASTER@FORUM.VA.GOV> in 'IN' basket.

The following titles have been added to the National Title Authority File. If you wish more information, you may look it up on FORUM.

Title: HOSPITAL ACCESS MANAGEMENT
Formerly: HOSPITAL ADMITTING MONTHLY

Title: CURRENT OPINION IN NEUROLOGY
Formerly: CURRENT OPINION IN NEUROLOGY AND NEUROSURGERY

Title: ARCHIVES OF PEDIATRIC AND ADOLESCENT MEDICINE
Formerly: AMERICAN JOURNAL OF DISEASES OF CHILDREN (NEW)

Select MESSAGE Action: IGNORE (in IN basket)//

Subj: CEASED PUBLICATION [#XXXXXXX] 03 JAN 94 20:05 EST 7 Lines
From: <POSTMASTER@FORUM.VA.GOV> in 'IN' basket.

Title: HOSPITAL ADMITTING MONTHLY
has ceased publication. Last issue date was 12,1993.

Title: CURRENT OPINION IN NEUROLOGY AND NEUROSURGERY
has ceased publication. Last issue date was 6N4,AUG 1993

Select MESSAGE Action: IGNORE (in IN basket)//

However, if a new title is created on FORUM and it is not tied to any previous title records, you will not receive a message about it. It is presumed that you will check the FORUM ULP-BIB file for it when you need it.

If you need to ask a question or comment to the Togus editors relevant to an automatic message which you have received from the "Postmaster", enter a **QD** at the "Select MESSAGE ACTION: IGNORE//" prompt to ascertain if Melda Page or Gary Pelletier are recipients of the message. If not, be sure to forward the message to one or both of them after you make your reply.

When you need a title record for use in the local serials module, you can go into FORUM under your 5-letter code. The 5-letter station code is a code for the Library and is intended for interlibrary loan purposes. It is not an individual code, and its access and verify codes should be known by more than one person on the library staff. This code is NOT a personal name code in terms of privacy. If a staff member feels the need for a PERSONAL code, a request should be submitted. This is a local decision. The 5-letter station code provides access to the following menu options.

HFO	Help for Library Options
ILL	INTERLIBRARY LOAN
ADP	Library ADP Directory Information
ULP	Library ULP Reports
DOW	Serial Title Download Request (NEW)
MAIL	MailMan Menu
ADR	Edit Station Address (NEW)

You choose the DOW option. Call up the title record which you want to have, either one new to your database or a previous one that has been changed in some way. The DOW option then asks "Are you sure that you wish to download this title and all associated information?" If you answer yes, the title then is downloaded through overnight network mail into your local serials module. An example follows.

ON FORUM UNDER YOUR 5-LETTER CODE

Select LIBRARY Option: ??<RET>

HFO Help for Library Options
ILL INTERLIBRARY LOAN
ADP Library ADP Directory Information
ULP Library ULP Reports
DOW Serial Title Download Request
MAIL MailMan Menu

Select LIBRARY Option: **DOW** <RET> Serial Title Download Request (NEW)

Select TITLE AUTHORITY: **JAMA** <RET>

FORMERLY: JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION
CONTINUED BY:
ISSN: 0098-7484
SERLINE IDENTIFIER: J03340000
PUBLISHER: AMERICAN MEDICAL ASSOCIATION
FREQUENCY: WEEKLY
PREDICTION PATTERN: R0026 WED/W/2V/Y,ST:JAN-JUL;ISRESET
NLM TITLE ABBREVIATION: JAMA
SYNONYM:
FIRST ISSUE: 173N9,JUL 1960 -
LAST ISSUE:

INDEXED IN: INDEX MEDICUS
SCIENCE CITATION INDEX
BIOLOGICAL ABSTRACTS
POPLINE
ABRIDGED INDEX MEDICUS
CANCERLIT
CANCER CORE JOURNALS
CHEMICAL ABSTRACTS
TOXLINE

GENERAL NOTES:

CONTINUES: JOURNAL OF THE AMERICAN MEDICAL ASSOCIATION. VOLUMES FOR 1960-1981 CONTAIN ANNUALLY: CONTINUING EDUCATION COURSES FOR PHYSICIANS, ALSO ISSUED SEPARATELY AS: CONTINUING EDUCATION COURSES FOR PHYSICIANS FOR THE PERIOD; FOR 1982- CONTAIN SEMI-ANNUALLY: CONTINUING EDUCATION OPPORTUNITIES FOR PHYSICIANS, ALSO ISSUED SEPARATELY AS: CONTINUING EDUCATION OPPORTUNITIES FOR PHYSICIANS FOR THE PERIOD. INDEXES: VOLS. 211-230, 1970-74. 1 V.

Are you sure that you wish to download this Title and all associated information? ? <RET>

Enter 'Y' to create a transmission transaction, 'N' to quit

Are you sure that you wish to download this Title and all associated information? **Y** <RET> (YES)

The title will now be downloaded to your local domain automatically. The system knows where you are because you entered under your five-letter code. If it is a new title for you, it will be added into your local database, ready for use. You should be able to locate it in Library Title Setup (LTS) option after 24 hours.

NOTE After you have loaded the new version of the Serials Module, a message that you have done so is automatically transmitted to the FORUM Manager. The FORUM Manager then must add your five-letter code to the list of libraries for which the DOW function will work. It may be a few days after you start with the new version of the Serials Module before that task is actually accomplished. So you may wish to wait a few days before you actually download title records to yourself.

If it is an "old" title with changes, it will simply replace the previous version of that title record. It will not harm any of the local data that was attached to it, such as check-in data, routings, holdings, etc., because the "newer" version replaces the "older" one.

NOTE When a title ceases, you may wish to download it again because it will have the LAST ISSUE information added to the record; likewise, if a title changes names, you may want to download the old title record to yourself (as well as the new one) because the old one will now show that it has closed.

Those fields currently without data will not display. Fields that may display include:

TITLE	SERLINE UNIQUE IDENTIFIER
LOCAL SERIALS	PUBLISHER
PREDICTION PATTERN	FIRST ISSUE
FREQUENCY	LAST ISSUE
PORTION	ISSN/ISBN
SYNONYM	FORMERLY
INDEXED	CONTINUED BY
GENERAL NOTES	NLM TITLE ABBREVIATION

Most of the quarterly journals do not have prediction patterns because they are dated as Spring, Summer, or Fall. The module, using mathematical functions, cannot predict based on seasonal names. Therefore, if a title does not have a prediction pattern, you won't see one under the title name. What you see instead is the FREQUENCY field with an entry that may say, for example, QUARTERLY,NO PREDICT.PATTERN. This has been included as a hint that this title does not have a prediction pattern.

Once you have the new Serials Module version installed, you can use the DOW or download function on FORUM for any title.

All titles may be searched and entered using lower case, upper case, or a combination of cases. The system will convert them to upper case.

If a journal has been listed under the same title twice, with a break in between, the words OLD and NEW have been added in parentheses after the title. JOURNAL OF ORAL SURGERY is an example. It was first used from 1943 to 1958, then changed to JOURNAL OF ORAL SURGERY, ANESTHESIA AND HOSPITAL DENTAL SERVICE, then changed back to JOURNAL OF ORAL SURGERY for 1965 to 1981. It is thus listed as JOURNAL OF ORAL SURGERY (OLD) and JOURNAL OF ORAL SURGERY (NEW).

If two publishers have used the same journal name, the place of publication is used in parentheses after the title. GERIATRIC NURSING (MINNEAPOLIS) and GERIATRIC NURSING (NEW YORK) are examples.

If the title is not in the national ULP-BIB file for you to download, you have the following two choices.

- You may send information to the Togus editors about the title via MailMan or fax, wait for them to get it created in the national ULP-BIB file, and then download it to your module.
- You may create it yourself, adding it in the Library Title Setup (LTS) option of your local serials module (see Section E), which will transmit it to the FORUM editors. While it is in this local portion, the TITLE field of the record may be edited, but not deleted. The other fields of bibliographic data to accompany this new title record may be both edited and deleted. Thus records may be transferred from FORUM to the local system and from the local system to FORUM. If you get a new title at the local site before the Togus editors have entered it and can get it into the online ULP-BIB, you can enter it into local module using the best information available at that time. You may prefer to do this as you can use the title record immediately for check-in.

The act of entering it at the local level will also automatically send it over network mail to the Togus editors on FORUM. When the Togus editors get it, they will examine it for correctness and completeness.

- If the record as received is as complete as it can be at that time, the Togus editors will accept it as is, and the act of acceptance will put it into the online ULP-BIB file.
- If the title is relatively correct, but needs some additional available information added to it, the Togus editors will make the corrections and accept it into the module. Again, the act of acceptance will put it into the online ULP-BIB. The correct title record will automatically overwrite the incorrect title record submitted by the local library. If the title field has been changed, you will also receive a message about it.
- If the title is a duplicate of a record already in the online ULP-BIB or if the Togus editors simply don't have enough information to verify the title in any authoritative source, the Togus editors will reject it. The act of rejection will send a message back to the local site which originally created it, giving the reason why it was rejected and/or telling them which title in the online ULP-BIB should be downloaded in its place. The rejection message may also request that photocopies of the title page, bibliographic information page, and table of contents page be sent to Togus. If the Togus editors reject a title, but you still want to keep it in your local module, you may do so; however, it will not be found in a form like yours in the online ULP-BIB.
- You may have locally created titles which, for specific local reasons, you do not wish to have added to the national Title Authority file on Forum nor do you wish to have overwritten by a different form of the title from the national Title Authority file. In such cases, you should send a MailMan message to either Gary Pelletier or Melda Page listing such titles and telling them that you want them to be rejected by the database editors. Please send this message as close to the creation of the title as possible. The database editors will then reject them. Your local form of the title will stay in your database unchanged.

This option may be useful for some monographic serials or where you have special general notes you wish to retain for local needs. Please remember, however, that they will not be reflected in the online Union List of Periodicals.

The FORUM editors may occasionally have to delete title records from the national database because of errors or previously uncaught duplicates. If so, you will get one of the two following MailMan messages on your local system.

A message notifying you that a particular title has been removed. No particular action on your part is required.

```
Title: ZZZDATTA  has been removed from the Title Authority File by PAGE,
MELDA.
```

A message notifying you that a particular title has been selected for deletion and asking you to respond by a certain date if you don't want it removed.

```
Title: ZZZDUMMY  has been selected for possible deletion from the Title
Authority File.
Please respond by DEC 8,1993 if you DO NOT wish this title to be
deleted from the Title Authority File.
```

NOTE These messages do not delete any title records from your local database. If you wish to delete any records which you are actively using, you may use the Remove Serial Title from Database (RST) option (see Section N).

When you add a new title record yourself to your local serials module, please follow the procedures below.

- At the "Select TITLE AUTHORITY" prompt, enter the full name of the serial title in all capital letters, omitting initial articles. Use SERLINE, UCMP, ULRICH'S, and the journal itself, in that order, for bibliographic verification.

ATTENTION Before entering an entirely new title at the "Select TITLE AUTHORITY" prompt, search for a title carefully in both the Library Title Setup (LTS) option as well as the FORUM-based ULP-BIB or DOW file using one of the following methods: key word, ISSN, significant word fragment, NLM title abbreviation, acronym as a synonym. Try each search method until you make an exact match or you determine that the title you want is not in either database. This should ensure the integrity of both the national online ULP-BIB database and the local database and should prevent unnecessary transmissions of duplicate entries to FORUM. In particular, use the ISSN on FORUM. The title may be in the FORUM database in a form very different from what you think it should be.

*****NOTE***** If the words of the new title to be added are actually a fragment of another title already in your database, the new title must be forced into the file with double quotation marks around it. For example, a new journal with the title FOOT must be entered as "FOOT" if FOOT AND ANKLE or JOURNAL OF FOOT SURGERY are already in the database. Without the quotation marks, the system will only present the two titles already in the file.

The system will prompt "ARE YOU ADDING XXXX AS A NEW TITLE AUTHORITY?" Respond yes ONLY if the title has been entered correctly. The system will then prompt for several items of bibliographic information.

*****IMPORTANT***** If you query the TITLE AUTHORITY FILE (TAF) with a word fragment, number, abbreviation, or incomplete title, and do not find a match, the system asks "ARE YOU ADDING "XXX" AS A NEW TITLE AUTHORITY?" Be sure to answer NO at this point. The query has demonstrated the need to add a new title to the local database, but it is important that it be added with its full and correct title, not a fragment, ISSN number, abbreviation, or incorrect title.

- To clarify the appropriate responses to each subsequent bibliographic element field, use the ? after each one to display the help prompts.
- Please try to enter as much correct bibliographic information as is available. The data you enter will be transmitted to the ULP-BIB editors on FORUM and will be verified by them before acceptance into the national database.
- The fields for which you will be prompted to enter data include the following. You are not required to enter data into any other than the TITLE field.

TITLE
LOCAL
PREDICTION PATTERN
FREQUENCY
PORTION
INDEXED
GENERAL NOTES
SERLINE UNIQUE IDENTIFIER
PUBLISHER
FIRST ISSUE
LAST ISSUE
ISSN/ISBN
FORMERLY
NLM TITLE ABBREVIATION

- The data in the following fields must exactly match the data in their accompanying files. If the correct data is not already there, leave these fields blank.

INDEXED - Source must be an allowable Indexing Source. Use ? at the "Select INDEXED" prompt to display the list.

PUBLISHER - Use a ? at the PUBLISHER field to display the list of available publishers.

Once your new title record is established in your local database, the system will state "Editing LOCAL SERIALS file" and prompt for local information for the following fields.

INACTIVE
INITIAL COPIES ORDERED
FOR-YOUR INFORMATION
PREDICTION POP-UP
CHECK-IN NOTES

INACTIVE

INACTIVE is an optional field. Entering a choice of C for Cancelled, D for Dead, or R for Renamed will prevent this title from being available for the check-in process; however, the title will be available for holdings, purchasing and bibliographic data. If the title is still active, enter <**RET**> to leave this field blank. Use the INACTIVE field to designate a title for which no copies are expected for current check-in. You may have a number of titles which are not current titles. They have either changed their name, or you don't receive a current subscription to them anymore, but you still have them in your collection and want them identified in the Serials Module so that you can attach holdings to them in the Holdings Setup (HOL) option (Section G) at some point in time. You don't want them showing up in the check-in part of the module because you're not checking anything in with them on a daily basis. Once a subscription is no longer being received and no more issues are due, use this field to remove this title from the Check-In (CHE) option (Section S). Holdings, purchasing, and History of Check-In (HIS) option (Section U) information will still be visible.

Whenever you add a new title record to your database which is the new or CONTINUED BY name of a serials title you previously received, you should remember to enter Library Title Setup (LTS) option for the older title, go to the INACTIVE field, and enter a code - **R** for Renamed - in it.

If ever you need to edit the INACTIVE field because you want to render a title active again, you enter the INACTIVE field and use the @ delete mark to delete whatever inactive code you had entered there.

INITIAL COPIES ORDERED

INITIAL COPIES ORDERED is a required field if the title has not been designated INACTIVE. Insert total number of copies currently being received, both purchased and donated. You must put in at least a quantity of one. This required field will not accept a zero. So you must enter at least the number 1 before you pass this field.

If more than one copy is indicated, the system will replicate the data which was entered for copy 1 for all the other copies, and then offer an opportunity to (e)dit any of that data in the Copy Specific Edit (CSE) option (Section F). For efficiency in data entry, the copy data for the first copy should be applicable to the majority of copies. This will reduce editing on your part.

If you enter one copy in this field initially, and later increase it to two or more, the additional copies will automatically be created in the Copy Specific Edit (CSE) option (Section F), replicating the data from the first copy. You may or may not need to edit that data in CSE, depending on the placement, source, and category of the new copy. However, if you entered more than one copy initially, and later adjust this value downwards, the copies will NOT automatically be subtracted from the Copy Specific Edit (CSE) option (Section F). You will need to use the (e)dit function in Copy Specific Edit to remove the copy you no longer receive.

FOR-YOUR-INFORMATION

FOR-YOUR-INFORMATION is an optional, free-text field of 75 characters which will always display immediately below the TITLE on the screens in Check-In (CHE) option (Section S), Return from Routing (RET) option (Section T), and History of Check-In (HIS) option (Section U). Possible uses include: (1) quick location information, (2) codes or initials for library staff scanning issues for current awareness before shelving, (3) reminders of those titles which must have issue dates inserted because they are not predictable, or (4) those titles which may require editing in Check-In (CHE) option (Section S) because the prediction pattern is not completely accurate.

PREDICTION POP-UP

In the PREDICTION POP-UP field, enter the number of days in advance of the date on the next expected issue that the issue is usually received in the library. The default is set to 5 days. Enter a **<RET>** if the issue is expected to be received five days or less before the next issue date. For example, if the POPULAR SCIENCE issue dated August 1995 is anticipated to be received on July 29, 1995, enter **<RET>**. If it is expected about July 20, 1995, enter **11<RET>**.

This field will usually not have to be adjusted for medical journals, which generally arrive after the issue date. It is more likely to have to be adjusted for general titles, whose issue and arrival dates usually run well ahead of the actual calendar date. For example, if we are in August, you may be getting the October issue of Dell Crossword Puzzles. In that case you may need to go back to the PREDICTION POP-UP field and insert a higher value here, about 30 to 45 days.

This field has no relevance if a title record has no prediction pattern. In that case, just **<RET>** by it.

The PREDICTION POP-UP field is a difficult field to explain and understand. It governs how far in advance the next issue date for the title will appear in the Check-In (CHE) option (Section S) after the current issue has been checked in. It is a field that you may ignore when you are first setting up your module and return to it at some subsequent date. After you have had some check-in experience with your individual titles, you will realize which titles need adjustment in this field.

CHECK-IN NOTES

CHECK-IN NOTES is an optional, word-processing type field, for special notes. If present, they are indicated on the check-in screen in Check-In (CHE) option (Section S), Return from Routing (RET) option (Section T), and History of Check-In (HIS) option (Section U) by the designation (N)otes. Possible uses include: (1) to denote priority placement of purchased versus gift copies; (2) to remind staff about special processing instructions; (3) to list binding data until bindery sub-module is ready; (4) to alert staff about changes in copy status; (5) to warn staff about peculiarities or irregularities in issue numbering, dates, etc.

When the Library Title Setup (LTS) option is completed for a title for the first time, the system will drop automatically into Copy Specific Edit (CSE) option (Section F), with the line: "Entering Copy 1 information." You must move through all these prompts before you can complete this title or exit it. You are not allowed to ^ out of the initial setup of a title in either the Library Title Setup (LTS) option (Section E) or the Copy Specific Edit (CSE) option (Section F) because an incomplete setup will cause errors in the Module.

Section F - CSE - Copy Specific Edit

Use this option to enter local information about specific copies of a specific title. For the first copy, the fields are as follows.

GIFT

If your answer is YES, you will see fields for an optional DONOR name and address. Then proceed to the PLACEMENT OF ITEM field. You will not see the VENDOR field. If your answer is NO, enter a <**RET**> so that the GIFT field is left blank. The system will then show you the VENDOR field. Use GIFT if you are not paying for the title on subscription. If you know who the DONOR is, then you may enter the donor's name. There is a Local Donor Titles (DON) report (Section AF) in the reports options that will print out all your gift titles with the donor name associated with it. The donor's name that you put in the DONOR field will also be added to the Name Entries (NME) option (Section J).

VENDOR

There will be a default to the current periodical procurement contractor which you specified in Library Site Parameters (LSP) option (Section B). To designate a different vendor, enter the name after the double slashes (/). The system will confirm this entry.

NOTE The VENDOR file to which this field points is a station-wide file under the control of A&MM Service. If you have vendors other than the default contractor, contact your A&MM Service to see how to have them entered into the Vendor file. Vendors must be entered into the Vendor file before you will be able to use them in this field. Be prepared to provide them with the full name, address, and phone numbers.

PLACEMENT OF ITEM

This field refers to the standard locations for placement of journals once they are checked in. These standard locations must first be entered in the Item Placement Location Entries (IPL) option (Section K) before they can be entered in Copy Specific Edit (CSE) option. These locations should include the name of Services for administrative titles as well as your various libraries. In Item Placement Location Entries (IPL) option (Section K), try to make entries for locations in such a manner that you can easily place them in this field by inputting only two or three unique characters to save keystrokes.

CATEGORY OF COPY

Select MEDICAL, GENERAL, RESEARCH, ADMINISTRATIVE, or PATIENT HEALTH EDUCATION. Use the initial letter to select each one. The data in this field will be used to sort information in some of the reports options under Serials Control (SER) option (Sections W and AJ).

COPY DISPOSITION

This field is used to note whether a journal is ROUTED, ROUTED AND RETURNED, or SHELVED. Selecting the designation ADMINISTRATIVE in CATEGORY OF COPY will cause this field to default to ROUTED. All other categories will default to SHELVED. It is possible to override any default by entering the correct designation after the double slashes (/).

If you choose either number 1 - ROUTED or number 2 - ROUTED AND RETURNED, the module drops you into a sub-routine where it will ask you for routing information. At the "Select TO ROUTE TO" prompt, you then enter, one by one, the names of the places or persons or titles to which you want to route this title. During the check-in process, routing slips will automatically be printed for those items designated ROUTED, ROUTED AND RETURNED, or ToC (Table of Contents).

Routing designees for a serial can be personal names, Service/Section names, position titles, or MDP (Mail Delivery Point) routing symbols. The system will establish a specific ROUTING ORDER by requesting a number for each entry. After any routing information has been entered, the numbered entries may be viewed by typing a ? at the next prompt for another routing entry.

At the "Select TO ROUTE TO" prompt, enter the name of the first routing designee. If the name has already been entered in Name Entries (NME) option (Section J) and associated with the Hospital Service File (HSF) (Section P), the Service and mail delivery point symbol (MDP) will automatically fill in. If the name entry is a new one, you will be asked to confirm that it is a new one, and then you will see the NAME SERVICE field, which must already be an entry in the Hospital Service File (HSF) option (Section P). If you do not enter a service/section for the NAME SERVICE field, no location or MDP will print on the routing slip.

ROUTINE ORDER

The next field will be for ROUTING ORDER. Routing orders can be decimal numbers and may be edited. For example, the routing sequence below was input in the order of Red, White, and Green; but the routing slip will print out in the order of Red, Green, White.

TO ROUTE TO	ROUTING ORDER
Red	1
White	2
Green	1.5

The system will keep prompting for additional "TO ROUTE TO's" until left blank. If the item is to be returned to the Library, be sure the Library is the final "TO ROUTE TO" entry. If you don't plan to use the Return from Routing (RET) option (Section T), don't use "ROUTED TO RETURN" as a COPY DISPOSITION. A ? at the next "TO ROUTE TO" prompt will display the routing designees, routing order, and mail delivery point symbols already established to facilitate the editing of the routing sequence.

To edit or delete entries in a routing sequence for a copy, first use the ? at a "TO ROUTE TO" prompt. The system will display the names, assigned routing order numbers, and mail delivery point symbols.

To delete a routing entry from the sequence altogether, type in the name. The system will ask "OK?YES//." Accept the YES default to indicate the choice of the correct entry. The name will replay immediately at the next "TO ROUTE TO" prompt. At that point, use the @ delete mark to delete this name entirely from the routing sequence for this particular copy. ***NOTE*** If a person with routing entries departs from your station, you should first generate a listing of those items for which he/she was receiving routings using the List of Recipients (REC) option (Section AN). Use that report to delete that name from each title copy or table of contents routed to that person, following this process. After all the deletions have been made, see Section J to edit the name in the Name Entries (NME) option.

To assign a different routing order to a name, choose the correct name and accept YES at the "OK?YES//" prompt. Accept the name again at the next "TO ROUTE TO" prompt. The system then displays the ROUTING ORDER field with the previously assigned number as the default. You may enter a new number after the //. When re-editing or reviewing already established routing information for a copy, the last routing designee entered will always appear before the double slashes at the "Select TO ROUTE TO" prompt. Enter a ? to see all the routing designees.

When an issue is being routed, one routing slip per issue will be generated. It will list all of the routing designees in order.

When multiple copies have been indicated in Library Title Setup (LTS) option (Section E) at the INITIAL COPIES ORDERED field, the system duplicates all data for each copy specified in the INITIAL COPIES ORDERED field. If you get 52 copies of TV GUIDE and you do the same thing with all 52 copies, instead of having to enter the data 52 times, the module does it for you all at once based on what you identified for copy one. However, for some copies, you may need to alter or edit some of the data. Changes in specific copy information may then be made as necessary at the "Do you want to EDIT any copy now? NO//" prompt. If you answer YES, you are presented with the following chart.

ID NUM	COPY NUM	START DATE	STOP DATE
1	1	-----	-----
2	2	-----	-----

Choose: (I)nsert , (E)dit , (R)emove . Exit//.

To edit data already established for a copy number or ToC for a title, enter **E** for (E)dit as well as the appropriate ID NUM from the chart, for example, E2. The system then presents the GIFT, VENDOR, PLACEMENT OF ITEM, CATEGORY OF COPY, COPY DISPOSITION, START DATE, and STOP DATE fields, allowing the data in each field to be edited. It also prompts for routing names and routing order, if appropriate.

In most areas of the Serials Module, the screen only holds five items in a chart at a time. If there are more ID NUMs than that, the instructions immediately underneath the screen chart will also include a (F)orward or (B)ackup command.

Once the data for Copy Specific Edit (CSE) option has been entered the first time for any specific title record, you may enter the Copy Specific Edit (CSE) option separately, without going through Library Title Setup (LTS) option (Section E) to modify or supplement the local data for that title.

If a title has been created in Library Title Setup (LTS) option (Section E) with two copies indicated in INITIAL COPIES ORDERED, Copy Specific Edit (CSE) option presents the following chart.

ID NUM	COPY NUM	START DATE	STOP DATE
1	1	-----	-----
2	2	-----	-----

Choose: (I)nsert , (E)dit , (R)emove , Exit//

You may insert additional copies by choosing I at the "(I)nsert" prompt. Insertion of copies here will also automatically change the number of copies expected in the Serials Control (SER) options (Section Q). This field also governs the number of copies which appear on the Titles Due for Renewal (DFR) report (Section AK).

After choosing (I)nsert to add a copy, the system will present the following fields for information: COPY NUMBER OR TOC, GIFT, VENDOR, PLACEMENT OF ITEM, CATEGORY OF COPY, COPY DISPOSITION, routing information if appropriate, and START DATE and STOP DATE.

START DATES and STOP DATES are useful for the advance setup of changes in numbers of copies of a title, for example, in the intervening months between the placing of the periodical order and the first of the year, or for the addition or cancellation of gift copies. If you use STOP DATES, it is useful to add a note to your CHECK-IN NOTES field in Library Title Setup (LTS) option (Section E) to alert your staff concerning the change in the expected number of copies at a certain time.

- START DATES and STOP DATES must be input in the form of M/D/Y.
- START DATES and STOP DATES relate to the JOURNAL DATE (issue date) field in the Check-In (CHE) option (Section S). Thus if the Check-In (CHE) option (Section S) is to display an additional copy of a title which begins to arrive with the April 1988 issue, the START DATE must be 3/31/88 or earlier.
- The STOP DATE must be at least one day after the copy's START DATE.
- If a copy has today's date as a STOP DATE, in the Check-In (CHE) option (Section S) a copy with a JOURNAL DATE of today will be accepted, but a JOURNAL DATE of tomorrow will not be.
- START DATES and STOP DATES may be adjusted at any time but will not change copy quantities for JOURNAL DATES already listed on the screen in Check-In (CHE) option (Section S) or already checked-in in the same option.
- If no START DATES or STOP DATES are entered for a copy inserted today, the system adjusts the number of copies for any new issues yet to be listed on the screen for check-in in the Check-In (CHE) option (Section S), regardless of the JOURNAL DATE of those issues.
- If you have cancelled a copy which was designated as a ROUTED TO RETURN type, use the STOP DATE field for that copy to indicate a date after the last expected issue. Use of the STOP DATE to indicate the cancellation of this copy will allow you to use the Return From Routing (RET) option (Section T) in the Serials Control (SER) option (section Q) after cancellation to indicate the final return of issues still being routed after the last issue has been received.

Also use the (I)nsert function to add the generation of Table of Contents (ToC) for a title. You should only (I)nsert the ToC once. To indicate that the ToC for a title should be routed to a patron, enter **I** for (I)nsert. At the prompt "COPY NUMBER or ToC", enter **T**. The system then prompts for "Select TO ROUTE TO". Enter the names of recipients of tables of contents and routing order. The last ID NUM in your chart will be for the ToC.

ID NUM	COPY NUM	START DATE	STOP DATE
1	1	-----	-----
2	ToC	-----	-----

Choose: (I)nsert , (E)dit , (R)emove , Exit//

Once the ToC has been inserted, you can add routings to it indefinitely by (E)ditting ID NUM 2 (in the example above) and adding more names at the "TO ROUTE TO" prompt. Routing order is not important here, but the routine requires that you enter a number. ***NOTE*** A separate routing slip will print out for each designee listed at the "TO ROUTE TO" prompt for ToC choices only. ***NOTE*** This is different than the routing slip for an issue, where only one per issue is printed.

The (R)emove function is not working properly in this version of the Serials Module. Do not use it. Instead, delete in Copy Specific Edit (CSE) option using the procedure below.

To delete a copy or ToC for a title, enter **E** for (E)dit. At the next prompt, enter the ID NUM for the copy or ToC to be removed. At the prompt "COPY NUMBER OR ToC:", use the @ delete mark to delete the copy or ToC which you want to eliminate. For example, to remove copy 4:

COPY NUMBER OR ToC: 4// @ <RET>

NOTE If this feature is used to remove a copy or the ToC, ALL THE ROUTING SLIPS listed will also be erased. First use the @ delete mark at a "TO ROUTE TO" prompt in the (E)dit function of Copy Specific Edit (CSE) option to delete individual names of recipients of a copy or a ToC.***

NOTE Do not use this function to cancel a copy for which issues were ROUTED TO RETURN while all those issues have not yet been returned in the Return from Routing (RET) option (Section T) in Serials Control (SER) option (Section Q). Instead, use a STOP DATE in the (e)dit copy function to indicate this cancellation. Only delete in this (E)dit function to remove such a copy after all ROUTED TO RETURN issues have been received back.

Section G - HOL - Holdings Setup

Holdings Setup (HOL) option is the section where you enter local information concerning holdings, subject categorization, acquisition and retention decision data, and union list coding for both active and inactive titles. This is an optional section which does not have to be activated during the initial use of the Serials Module. All fields are optional. Before using this option, you must have entered Subject Headings using the SUB Subject Setup option (Section L). The fields are as follows.

PLACEMENT

This field identifies where the journal will be kept after check-in and/or routing. You must first enter the location in the Item Placement Location Entries (IPL) option (Section K). This field is used for several of the holdings reports; therefore, if you plan to use the reports, you should ensure that this field has been used, even if it is optional. There is a field called PLACEMENT OF ITEM in the Copy Specific Edit (CSE) option (Section F), and indeed, the two fields are very similar. However, the placement that you give it in Copy Specific Edit (CSE) option (Section F) does not translate over to Holdings Setup (HOL) option. You may receive several copies of an item with several different placement locations in Copy Specific Edit (CSE) option (Section F), but the final placement location that you use in Holdings Setup (HOL) option may be only one of those multiple placements.

MICROFILM HOLDING

If you enter data in this field, you will be able to print a separate list of your microformat holdings through the Local Microfilm Titles (MFT) report option (Section AB). You may choose your own holdings format for microforms.

MICROFILM VENDOR

This field will allow a choice of vendor name from the Vendor file. However, the specific microformat vendor must already be an entry in the station's Vendor file. Reports may be printed with microformat holdings and vendor information (Section AB).

Select SUBJECT

Locally preferred subject headings must already be established in the Subject Setup (SUB) file (Section L) before they can be used here. This is a multiple field in which more than one subject may be assigned to a title. Reports may be printed out sorted by subject heading.

Select CATEGORY

Choices are limited to M for Medical, G for General, R for Research, A for Administrative, or P for Patient Health Education. This is a multiple field, allowing a different category for each copy. A library may have, for example, two copies of PSYCHOLOGY TODAY, 1 Medical and 1 Patient Health Education. Reports may be printed out sorted by category. While this is an optional field, many reports sort against this field; thus, if the reports are to be utilized, you should ensure that this field has had data entered into it. Again, this field is similar to the CATEGORY OF COPY field in Copy Specific Edit (CSE) option (Section F), but what you put in Copy Specific Edit (CSE) option (Section F) does not translate over to Holdings Setup (HOL) option because the system does not know which copy you are specifying.

RECOMMENDATION

This field is for a retention/deletion recommendation; use R for Retain or D for Delete. If D is chosen, you will be provided with the following subset of fields.

DELETION DATE: Enter a standard FileMan date.

DELETION NOTES: This is a 60-character free text field for local notes/comments.

Select UNION LIST CODE

This multiple field is case sensitive. More than one choice can be made for each title. Lists of holdings may be generated by union list code in the Titles by Union Lists (TUL) report option (Section AO). Choose from the following.

- C Core title (VA)
- H Holder of Record (VA)
- U Unique title
- V VA Union List of Periodicals
- L Local consortia union lists
- S State union lists
- R Regional Medical Library union lists
- O Other

BRIEF SUMMARY HOLDING

This field should be used for your summary holdings statement that integrates all formats. It is the required field for eventual automatic submission of your local holdings via network mail to the VA online Union List of Periodicals (ULP) on Forum. It is required that you use this format: V.5, 1965 - V.6, 1966; V.8, 1968-

DETAILED HOLDING

This is a word-processing type field. Use whatever format you wish to suit local needs. This field is suggested for those who need an issue-specific holdings statement. ***NOTE*** Some of the reports will provide a choice for printing either the brief or detailed holdings statements.

RETENTION POLICY

This is a free text field limited to 20 characters. Enter a date, a number, or a phrase to indicate the retention period for a title, e.g., 10 (for 10 years) or current year + 1, etc. You may also wish to consider the use of standard SERHOLD nomenclature in this field to facilitate the future automation of SERHOLD updates.

GAPS

This is a word-processing type field. Missing issues and volumes may be listed here. A Gaps report (Section AL) will print from this field for easy comparison with surplus lists.

REMARKS

This is a word-processing type field that is purely for local use. Use this field for local data for which there are no other available fields.

RENEWAL DATE (HC)

This is a date type field. Enter a renewal date for a hard-copy subscription.

RENEWAL DATE (MF)

This is a date type field. Enter a renewal date for a microformat subscription.

REQUESTOR

This field is for the entry of a personal name or Service name. It refers back to Name Entries (NME) file (Section J). New names can be added to this file from here without first having been entered in NME.

SUBSCRIPTION PERIOD

This is a numeric type field. Enter the length of the subscription period. Decimal numbers are permitted, for example, 6 months = .5. This information will appear in the Titles Due for Renewal (DFR) report (Section AK).

Section H - PIE - Purchasing Information Edit

The Purchasing Information Edit (PIE) option provides for the entry of cost and funding data for each title. This is an option which does not have to be utilized during the initial setup of the Serials Module. It is optional and can therefore be activated as desired at a later date. A "No holdings on file" message signifies that the local facility holdings information was not entered after all titles were downloaded by the facility. There will be prompts for the following.

FUNDING SOURCE

This is an optional, 3-30 character free text field. Enter a word to designate the source of funding, such as VAMC, RESEARCH, RML, VACO.

UNIT COST

This is an optional, numeric field. Use decimal points. Use the current year cost without the service charge. Some choose to use the publisher's price here and the vendor's price in the P.O. NUMBER field, for comparison purposes.

LAST YEAR'S UNIT COST

This is an optional, numeric field. Use decimal points. Use it to display last year's unit cost without the service charge for comparison purposes.

SERVICE CHARGE

This is an optional, numeric field. Enter the current year's service charge or surcharge. For example, if the service charge was 11.06% enter 11.06. This percentage will be multiplied against the UNIT COST field to derive a total cost in some of the reports.

P.O. NUMBER

This is an optional, 2-15 character free text field. Some use this field to record the vendor's actual price in order to compare it to a publisher's price which has been entered in the UNIT COST field above.

CONTRACT NUMBER

This is an optional, 2-15 character free text field. You may wish to use this field to list your direct order or non-default vendor in this field.

Section I - LSF - Library Supporting Files

The creation of the supporting files is one of the beginning steps required to initialize the Serials Module at each Medical Center. Separate creation of these files under the Serials Management (LSM) menu (Section C) ensures consistency of entries in other options in the Module. The files are as follows.

NME for Name Entries option (Section J)

IPL for Item Placement Location Entries option (Section K)

SUB for Subject Setup option (Section L)

Entries must be made in two of these files, Item Placement Location Entries (IPL) option (Section K) and Subject Setup (SUB) option (Section L), before they can be used elsewhere.

Section J - NME - Name Entries

Name Entries (NME) option is simply a file of all the names that you may ever use in the module. Most of these names are names of people to whom you route issues or tables of contents. But they can also be the names of people who have donated items to the library, or they can be the names of people who have requested to have a certain journal added to the collection. Names can be input at the "TO ROUTE TO" prompt in Copy Specific Edit (CSE) option (Section F); the DONOR field in Copy Specific Edit (CSE) option (Section F); and the REQUESTOR field in Holdings Setup (HOL) option (Section G).

Enter the name as it should appear on the first line of the routing slip. Personal names, organizational names, titles, or locations are all appropriate as routing designees, and thus can be defined as a "Name Entry". A "name" can be whatever would be the entry on a routing slip that you might have made manually. Personal names should be entered in a consistent form. It is recommended that you use LASTNAME, FIRSTNAME to avoid confusion.

After you enter the name, the system will prompt for Service name, which must already be entered in the Hospital Service File (HSF) option (Section P), as well as the address and telephone number, which are optional.

*****WARNING***** Entries in the Name Entries (NME) option can be edited but not deleted. Since Name Entries (NME) option is a pointer file, careless deletions will cause errors in the database which would destroy your routing routines. If a name will not be used again, you could choose to edit it to the group of XXX or ZZZ records (referred to as Xs or Zs) or to a phrase, such as USE FOR NEXT ENTRY. Then, when you subsequently are adding a new name, select the X or Z entry and edit it into a legitimate name.

When a "name", especially one used for a routing, is no longer at your station, first delete that person from each journal title for which he/she is being routed an issue or table of contents, using the process in Section F. Generate the List of Recipients (REC) option report (Section AN) to provide you with the list of titles. Only AFTER that name has been deleted from the routing sequence for all titles, use the Name Entries (NME) option to edit that name into Xs or Zs until it can be used for another legitimate name. If it is edited into Xs or Zs before the deletion from the routing sequences is done, the routing slips will generate with Xs and Zs in place of legitimate names.

Entries do not have to be made in this Name Entries (NME) option prior to first use, although you may if you wish. When you enter a name for the first time elsewhere in the Module it will also be entered automatically into the Name Entries (NME) file.

Section K - IPL - Item Placement Location Entries

Use this option to enter or modify the location, inside or outside of the library, where the serials will finally be kept after they are checked in.

Because the Item Placement Location Entries (IPL) option is ultimately linked to individual titles in the Copy Specific Edit (CSE) option (Section F) and Holdings Setup (HOL) option (Section G), the standard locations **MUST ALL** be entered in this option before they can be used in Holdings Setup (HOL) option (Section G) or Copy Specific Edit (CSE) option (Section F).

At the "Select LIBRARY ITEM PLACEMENT LOCATION NAME" prompt, enter the possible locations of the serials. Examples include MEDICAL LIBRARY, PATIENT'S LIBRARY, 200 LIBRARY, PERC, RESEARCH LAB, WORKROOM, and PHARMACY. Be sure to enter names of Services where administrative journals are routed if reports sorted by those Services are desired.

****HINT**** If you have locations with similar names, try to start each location, especially those frequently used, with two to three unique characters. For example, you may have two library locations, medical and patients. If you establish them in this file as LIBRARY, MEDICAL and LIBRARY, PATIENT, each time you input "LIB" you will have to answer a multiple choice message. Instead, establish them as MEDICAL LIBRARY and PATIENT LIBRARY. You can then uniquely select them at the field with "MED" and "PAT".

Entries can be edited but not deleted. Since this is a pointer file, careless deletions might cause errors in the database. If you make an erroneous or unneeded entry here, you can temporarily edit it into a group of Xs or Zs or into a phrase, such as USE FOR NEXT LOCATION. Then, when subsequently you are entering a new location, call up the X or Z entry and edit it into a legitimate location.

Section L - SUB - Subject Setup

Subject headings, which will be assigned to individual titles in Holdings Setup (HOL) option (Section G), are a local decision. Each library should develop its own list in advance and then enter the assigned subject headings in Subject Setup (SUB) option. The Library Expert Panel did not choose to make a list of subject headings and deliver it with Serials Module package. Thus you must decide on the subject heading terms that you want to use and put them in this option before you can attach them to individual titles in the Holdings Setup (HOL) option (Section G) option. A good authority to consider is included in the National Library of Medicine's List of Serials Indexed for Index Medicus.

Subject headings must be entered in this option before they can be used in Holdings Setup (HOL) option (Section G). You may have elected not to use Holdings Setup (HOL) option (Section G) until a time much later than initial utilization of the check-in function. Therefore, you don't have to establish these subject headings at the beginning. You may wait until you're ready to use Holdings Setup (HOL) option (Section G).

At the "Select SUBJECT NAME" prompt, enter the term.

Subjects may be edited but not deleted. Since this is a pointer file, careless deletions might cause errors in the database. If you make an erroneous or unneeded entry here, you can temporarily edit it into a group of Xs or Zs or into a phrase, such as USE FOR NEXT SUBJECT. Then, when subsequently you are entering a new subject, call up the X or Z entry and edit it into a legitimate subject.

Section M - PUR - Purge Journal Date/s from a Title

At least yearly there is a need to delete from the system some of the issues identified by ID NUM on the screens in the Serials Control (SER) option (Section Q). It's a way of cleaning up some of the errors that can occur during check-in without deleting the entire record. There are three reasons to use this option.

- You have several years of check-in data displayed and have decided that you no longer need to access this older data.
- Your block allocation from IRM is too small for extensive retention of check-in data. Failure to remove old data will result in errors or loss of data.
- You have created duplicate or erroneous issues which you wish to remove altogether.

After a year or more of check-in activity for a title, the screens in Check-In (CHE) option (Section S) may have very long lists of issues, which are time-consuming to (b)ackup or (f)orward through and which also reduce the efficiency of the entire system.

It is recommended that you keep no more than one to two years of check-in data on the Check-In (CHE) option (Section S) screens. For general titles without back holdings, it is convenient to keep only the past 12 months. For weekly titles in particular, it is desirable to purge at least yearly. A full year of a weekly will have 52 line items in Check-In (CHE) option (Section S).

Before you purge any issue dates you should be sure that (1) any missing issues have been claimed and received, if possible, and (2) that the BRIEF SUMMARY HOLDING and/or DETAILED HOLDING fields in Holdings Setup (HOL) option (Section G) accurately represent your check-in data. Before purging, use a slaved printer to print out the year that you would like to purge from the History of Check-in (HIS) option (Section U) screens. Check the shelves to ensure that all issues listed as checked-in are present. Then check the holdings statements in Holdings Setup Option (HOL) option (Section G) to see that they accurately reflect your actual holdings for that time period. Then purge the issues in that time period by selecting the range of ID NUMs that should be removed. The system will renumber the remaining ID NUMs.

To purge Check-In (CHE) option (Section S) data, do the following.

- Select the Purge Journal Date/s From a Title (PUR) option.
- Enter the title to be purged.
- Use the (f)orward or (b)ackup command to find the issue ID NUMs which you want to purge. You can also move quickly through the sequence by estimating the number of ID NUMs and using that number in the forward command, e.g., F22.
- Enter the ID NUM of the issue to be purged. The system will respond with PURGING APRIL 1988 ISSUE.
- You may purge more than one ID NUM at a time by using a hyphen for a range of ID NUMs or commas for several separated ID NUMs, or a combination of the two methods; for example: 1,3,10,12-20. Do not use spaces.

You are cautioned, however, to be sure that you know that you are in Purge Journal Date/s from a Title (PUR) option and be aware of what you are doing. It is possible to work too fast and purge something unintended. Once the ID NUM is entered with a **<RET>**, that line item is gone. You would have to recreate it again in Check-In (CHE) option (Section S). If you purged out the very last date or the most recent date on your screen, you may not have to insert it again. It may predict itself. But if you purge out one that is in the middle or at the beginning of the check-in list, then you will have to insert it to put it back in.

The Check-In (CHE) option (Section S) option for a title may display duplicate or erroneous journal issue dates. The duplicate issue dates usually occur when the title is set to predict but the same expected issue date has also been inserted. Every time the title is reentered, another of the same issue date is predicted to the screen. To purge these, do the following.

- In Check-In (CHE) option (Section S), use the (e)dit function to edit the ID NUMs of the duplicate entries.
- At the ENTRY TYPE field, change the ENTRY TYPE of the first of the duplicate dates to P for Predicted. Change the ENTRY TYPE of the subsequent identical issue dates to I for Inserted. Make all these changes without exiting the title between changes.
- Leave Check-In (CHE) option (Section S) and go to Purge Journal Date/s from a Title (PUR) option via ^PUR. Use ^^PUR if you will be returning to Check-In to continue.
- Use **space bar<RET>** to pull up the same title.
- Use the (f)orward or (b)ackup command to find the issue ID NUM of the issues where you changed the ENTRY TYPE to I for inserted. These are the ID NUMs which you need to purge.
- Enter the ID NUMs of the issues you wish to purge. The system will respond with PURGING APRIL 1988 ISSUE.

Occasionally things can get messed up to the point where the system seems to predict multiple line items for the same issue date. Instead of editing the line items to correct everything, you may find it easier to purge it out and start all over again.

Section N - RST - Remove Serial Title from Database

Use this option to remove a serial title record and all its associated data from the database. *****WARNING***** ALL data about that title record, including holdings, check-in, and copy information, will be removed from the system upon title deletion when you use this option.

Use this option to remove titles for which you wish to have NO RECORD AT ALL, or which were added by mistake to your local database.

Because the deletion of a title record is a drastic action, the system requires you to answer in the affirmative twice before it proceeds to remove the record.

Do NOT use this option to indicate a name change or a discontinued title. Instead use the INACTIVE field in Library Title Setup (LTS) option (Section E).

If you add a title record to your local database by error while in Library Title Setup (LTS) option (Section E), as soon as you have completed the required entries in Library Title Setup (LTS) option (Section E) and Copy Specific Edit (CSE) option (Section F), you can immediately proceed to the Remove Serial Title from Database (RST) option. Use the **space bar**<**RET**> feature to retrieve the same title and proceed to remove it.

Section O - MCF - Medical Center Files

Medical Center Files (MCF) presently has only one option, Hospital Service File (HSF) (Section P), for which it serves as a gateway.

Section P - HSF - Hospital Service File

Select this option to view Services/Sections with their mail codes to which journals may be routed. This file must be associated with your local Serials Module. This file may belong to your MAS or IRM, but it is a file of all those services, wards, and sections with their associated mail delivery or mail routing points that your hospital uses. If it is not available at this option, contact your local IRM manager immediately.

To be suitable for library routing purposes, this file must have entries for sections or subsections, such as Nursing Education, SPD, wards, units, etc., along with their mail symbol. You must check this file to make sure that it not only lists the services but that it also includes the wards and various sections to which you may possibly route items. It should have the same locations and the same symbols that you would use on the green routing slips that your mailroom utilizes at your station. If the correct entries are not in this file, you may have to give a list to whomever the owner is, requesting that they be added.

NOTE This file must be present before any routing entries can be entered in Copy Specific Edit (CSE) option (see Section F).

Routing locations CANNOT be entered into this file from other points in the system. All routing locations must already be entered in this option.

To display a particular entry in the HSF, at the prompt "Select SERVICE/SECTION NAME" enter the first few characters of a Service or Section such as LIBRARY SERVICE, NURSING SERVICE, 2 NORTH (WARD), SPD, etc. This field is for the name or abbreviation of the Service/Section, NOT for mail delivery point (MDP) numbers. You may also enter a ? at the "Select SERVICE/SECTION NAME" prompt to get a list of all the entries in that file.

After the Service, Section, or Ward name has been selected, the system will display the MDP routing number or designation, such as 142D, 136, etc.

Section Q - SER - Serials Control

Serials Control Menu (SER) provides the capability to check-in a journal issue, return a journal issue from routing to the library collection, call up and view the check-in history of a journal issue, reprint a routing slip if needed, and generate reports and lists.

It also provides general information about the package which you should read first before proceeding with any data input (Section R).

All routines in this section may be done by any library staff person responsible for day-to-day management of serials. The Serials Module has been structured in such a way that some of your employees can be given access only to this Serials Control (SER) menu. If you elect, you may give your library technicians, who may be performing your check-in process, access only to this part of the module, reserving access to the Serials Management (LSM) menu (Section C), where you create your title database, to your professionals. If you want to provide customized menus of access other than these two levels, you must contact your local IRM service for assistance.

The following options are available on this menu.

SCI	General Serials Control Information
CHE	Check-in
RET	Return from Routing
HIS	History of Check-in
RRS	Reprint Routing Slips

REMINDER A title must be entered initially in Library Title Setup (LTS) option (Section E) before it can be called up for use by options on the Serials Control (SER) menu.

Section R - SCI - General Serials Control Information

In the Serials Control (SER) option (Section Q), SCI - General Serials Control Information, at the top of the menu, is a gateway to the help frames for the entire Serials Control (SER) option (Section Q). You may proceed as deeply into the help frames as you wish, and you can also exit them at any point by using the UP-ARROW cue. You can also enter the help frames for any particular option by using the question mark and three-letter code. This procedure will take you directly to the section of frames for that specific option.

Section S - CHE - Check-In

The check-in process involves the following.

- * identifying the title
- * inserting issue dates and volume and issue numbers
- * automatic prediction of issue dates
- * advance insertion
- * simple completion of check-in
- * editing and deleting dates
- * backing up, forwarding, and reading notes
- * partial receipts
- * out-of-sequence check-in

To retrieve the title of an issue which is ready for check-in, enter one of the following at the "Select LOCAL SERIALS" prompt.

- significant word or word fragment from the title
- ISSN/ISBN number
- NLM title abbreviation
- synonym such as AJN for AMERICAN JOURNAL OF NURSING
- the first few words of the title truncated at the right

If a numbered list of choices appear, select the correct title by number. For example:

Select LOCAL SERIALS: **PSY <RET>**

- 1 PSYCHIATRIC MEDICINE
- 2 PSYCHOLOGY TODAY
- 3 PSYCHIATRY ARCHIVES OF GENERAL PSYCHIATRY
- 4 PSYCHOLOGY JOURNAL OF CLINICAL PSYCHOLOGY

Choose 1-4: **2<RET>**

NOTE If you have entered anything in the FOR-YOUR-INFORMATION field in Library Title Setup (LTS) option (Section E), that data will display immediately under the title in Check-In (CHE) option.

If you are selecting a title for check-in for the first time, and thus you have not already established a list of issues for a title, the following prompt will appear.

Choose: (I)nsert
Exit//

Input **I** after the double slashes (/). You will see the following fields.

JOURNAL DATE:
VOLUME:
ISSUE/PART/SUPPLEMENT:

NOTE It does not matter at what journal issue date you decide to start the Check-In (CHE) option.

At the JOURNAL DATE field it is possible to enter dates in the following forms.

Year (e.g., 1987 or 87)
Month/Year (e.g., 1/87 or Jan 87)
Month/Day/Year (e.g., 3/22/88 or Mar 22, 1988 or 032288)

The system will convert months into the usual 3-letter abbreviations.

In the Month/Day/Year format, the system will select the current year automatically if the year is not entered.

NOTE This field does not take words, such as Spring, Fall, etc. If the journal is dated Fall 1987, enter the date in this field as 1987, and enter "Fall" in the ISSUE/PART/SUPPLEMENT field.

Some journals use a range of dates as the issue date. Because the prediction patterns have been based on the first part of the date range, you should choose the first date in such a range as your inserted date.

For example:

<u>If the issue date is</u>	<u>(I)nsert</u>
JANUARY-FEBRUARY 1988	1/88
MARCH 13-20, 1989	3/13/89
APRIL-MAY-JUNE 1988	4/88

VOLUME: Enter a volume number if none is displayed before the default marks. During the check-in process the volume number for subsequent issue dates is "predicted" based on the first item entered. The default value is displayed, but may be changed at any time by typing a new number to the right of the double slashes (/).

ISSUE/PART/SUPPLEMENT: Enter no more than 15 characters to identify the issue. Use Arabic numerals for regularly numbered issues. Use words and abbreviations to identify unnumbered issues, parts, or supplements.

ID NUM: The system assigns an identification number in the left-hand column in chronological order for each listed issue of a title. This ID NUM is used for actions concerning a specific issue, including retrospective check-in and editing.

The check-in screen with an assortment of issue date information could look like this.

ID NUM	JOURNAL DATE	V(I)
1	1987	40 (WINTER)
2	1987	40 (SPG)
3	JAN 1987	40 (1)
4	JAN 15,87	40 (1, PT 2)
5	FEB 1987	40 (2)

After you have inserted the JOURNAL DATE, VOLUME, and ISSUE/PART/SUPPLEMENT information for the first issue, the screen will repaint that information and ask: "Do you want to check-in X copies of XXX issue today? YES//." If you accept the default answer of YES with a **<RET>**, you can then exit with another **<RET>**. The screen will show that this copy of the issue has been received. If routings have been established, it will also indicate that routing slips have been queued to a printer.

TITLE: GUT **<RET>**

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1988	2(1)		1		

Do you want to check-in 1 copies of JAN 1988 issue today? YES//**<RET>**
c1 RECEIVED Queued to printer ANN.
ToC ROUTING LIST queued to printer ANN.

Check-in completed.
EXIT//**<RET>**

Because this title had routings on it, routing slips will print out very quickly at your separately ported printer. The routing slip for copy 1 will resemble:

Veterans Administration ROUTING SLIP

ROUTE TO:

111 RED/MEDICAL SERVICE

112 GREEN/SURGICAL SERVICE

115 WHITE/NUCLEAR MEDICINE SERVICE

GUT
JAN 1988 2(1)
COPY 1 ROUTING SLIP

FROM LIBRARY, 142D FEB 4,1988

When this routing slip was created in Copy Specific Edit (CSE) option (Section F), you first had Red as number one, White as number two, and then added Green in the third action as number 1.5. Because of that, it has printed out as the second item on this routing slip.

Note: "FROM LIBRARY, 142D" which prints at the bottom left corner of the routing slip cannot be edited or changed. The Library Expert Panel realizes that the routing symbol 142D is no longer accurate for many libraries. This change will be addressed in the next version.

You will then be asked for the next title to be checked-in.

If you reenter the title, you will see that the JAN 1988 issue has been checked-in and if the predicting ability is enabled and the next expected journal date falls within a certain time frame, it will ask you if you wish to check-in the next issue.

TITLE: GUT <RET>

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1988	2(1)	FEB 4,1988	1	1	ALL
2	FEB 1988	2(2)				

Do you want to check-in 1 copies of FEB 1988 issue today? YES//
NO <RET>

If you do not wish to check-in the x number of copies of that issue, enter **NO<RET>** to the question. The system redisplay that title, lists the issues, and presents the choices for action, including EXIT//.

TITLE: GUT

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1988	2(1)	FEB 4,1988	1	1	ALL
2	FEB 1988	2(2)		1		

Choose: "ID NUM" to check-in, (I)nsert, (E)dit.

Exit// **<RET>**

The ability of the Serials Module to predict the next expected issue speeds up the check-in process considerably; however, it is a complex function.

If there is an entry in the PREDICTION PATTERN field for a title in Library Title Setup (LTS) option (Section E), the Module will automatically predict subsequent journal issue dates, volume numbers, and issue numbers on the check-in screen for that title, after you (I)nsert the first JOURNAL DATE, VOLUME, and ISSUE/PART/SUPPLEMENT number. *****NOTE***** Prediction patterns are created and assigned by the Togus database editors. To determine if a title has a prediction pattern, exit Check-in, type **^^LTS**, and use **space bar<RET>** to pull up the same title in Library Title Setup option. Look at the title record to see if there is an alphanumeric code in the PREDICTION PATTERN field. If there is, this title has a prediction pattern. Return through the other prompts in LTS until you can exit it. You will then be returned to Check-in.

If there is no prediction pattern associated with the title in Library Title Setup (LTS) option (Section E), then all journal issue dates for that title will have to be inserted for check-in. As prediction patterns are added to the ULP-BIB file on Forum, you will receive messages about them. If they list titles which you are using, you can then download the titles (see Library Title Setup (LTS) option Section E) to overwrite your records, thus adding the predicting ability or correcting old prediction patterns which may have changed. If you feel that a journal which you receive has a regular, numerical frequency and could have a pattern, please fill out a copy of the form in the Appendix and mail or fax it and copies of the title page, table of contents page, and bibliographic information page to the Togus database editors.

*****NOTE***** There will be no prediction patterns for annuals and for titles which do not use a month as part of the issue date, such as Fall, Spring, etc. The prediction mechanism cannot work without a month in the issue date.

For titles which are published weekly, any already predicted JOURNAL DATE no further into the future than 5 days will predict a new JOURNAL DATE if you exit the title and then reenter it.

The first time you use a title in Check-in (CHE) option, you must insert the first JOURNAL DATE, VOLUME, and ISSUE/PART/SUPPLEMENT. The Module automatically recognizes this insertion as the first one and converts the ENTRY TYPE to prediction.

If a title already has had issues inserted for check-in, and then a prediction pattern for the title is established, it is necessary to EDIT the ID NUM for the last JOURNAL DATE and change the ENTRY TYPE field from "Inserted" to "Predicted". After making this change, exiting, and calling up the title again, the prediction pattern will be operative for this title. With this new version of the Serials Module, you will have many titles which were "new" in the intervening years which now have prediction patterns on them as well as "old" titles where the prediction pattern has been changed or one added. You will have to use this function to activate those patterns. You should check your local database and activate the predicting function as needed.

If the prediction pattern specifies a day-of-the-week type date and you insert a month-type date as the first JOURNAL DATE, the system will not be able to recognize it, and thus will not predict future issues.

If the prediction pattern specifies a month-type date and you inserted a day-of-the-week date as the first JOURNAL DATE, the system will be able to predict the next month date.

If the prediction pattern specifies the 31st of the month, the system will convert this date to the correct last day for each month.

If the prediction pattern specifies a certain day of the week and you insert a different day of the week as the first issue, the system will list the correct day of the week for the subsequent JOURNAL DATES.

You may insert a supplement or any other issue at any place in the list of JOURNAL DATES. This will not disturb the prediction function. The Module recognizes insertions as insertions and ignores them as far as the predicting function is concerned.

The Module can only predict numerical sequences. If you used an alphabetical entry for any part of the ISSUE/PART/SUPPLEMENT field, the Module cannot predict that part of the next issue. You must use the (E)dit function to add the alphabetic data after the ID NUM is predicted.

Some titles, while regular, have a frequency and numbering system for which it is impossible to establish a perfect prediction pattern. If the frequency and numbering system is close to an established pattern, that pattern has been used with the intention that the user will have to (I)nsert or (E)dit some entries. For example, if a journal has 13 numbered issues per year in one volume, the pattern for 12 issues in one volume has been selected. The user will have to (I)nsert the 13th issue. It is also common for some very regular weeklies to combine year-end issues, resulting in the need to (E)dit those entries that have been predicted for the last issue of the old year and the first issue of the new year.

However, if the frequency and numbering system pattern of the title is far from any established pattern, the title has been left without a pattern, and all issues will have to be inserted.

For MM/YY-type JOURNAL DATES, if the next predicted JOURNAL DATE is the same month as today or an earlier month, the check-in question "Do you want to check-in x copies of x date issue today? YES/" will automatically appear, and check-in can be accomplished quickly with just two keystrokes.

For MM/DD/YY-type dates, if the next predicted JOURNAL DATE is the same date as today or an earlier date, the automatic question will also appear for quick check-in.

If the next predicted JOURNAL DATE for check-in is (1) a month ahead of today's month for MM/YY-type dates, or (2) any date ahead of today's date for MM/DD/YY-type dates, check-in must be accomplished by selecting the correct ID NUM.

Some journals or magazines are published so that they arrive in the library months ahead of their cover date. In such cases, you may have to increase the value which appears in the PREDICTION POP-UP field in Library Title Setup (LTS) option (Section E). For example, in early August you may receive a copy of a monthly magazine called Boxing World which carries the cover or JOURNAL DATE of October. In order to get the October date to predict for this title while you are still in August, change the value in the PREDICTION POP-UP field to 45 to 60.

The Check-In screen for a title may display duplicate journal issue dates, sometimes many of them. This duplication of issue dates usually occur when the title is set to predict but the same expected issue date has also been inserted, in error. Usually the insertion of the issue date was done before the system had a chance to predict that date. The actual issue usually has been checked-in as received to the inserted issue date. Then, every time the title is reentered, another of the same issue date is predicted to the screen. To purge these do the following.

- In Check-In (CHE) option, use the (e)dit function to edit the ID NUMs of the duplicate entries
- At the ENTRY TYPE field, change the ENTRY TYPE of the first of the duplicate dates to P for Predicted or the one where the item is actually checked-in. Change the ENTRY TYPE of the subsequent identical issue dates to I for Inserted. Make all these changes without exiting the title between changes.
- Leave Check-In (CHE) option and go to Purge Journal Date/s from a Title (PUR) option (Section M) via **^PUR**. Use **^^PUR** if you will be returning to Check-In to continue.
- Use **space bar<RET>** to pull up the same title.
- Use the (f)orward or (b)ackup command to find the issue ID NUM of the issues where you changed the ENTRY TYPE to I for inserted. These are the ID NUMs which you need to purge.
- Enter the ID NUMs of the issues you wish to purge. The system will respond with PURGING APRIL 1988 ISSUE.

Issues can be inserted into the check-in sequence for several reasons.

- * for advance insertion for non-predicting titles
- * for older issues for retrospective check-in
- * for the insertion of irregular or unnumbered or strangely numbered supplements, special issues, etc.

It is possible to insert issues in advance of actual arrival if you know the pattern of issue date, volume, and numbering. This advance insertion will speed up check-in significantly. Advance insertion should only be used for those titles for which a prediction pattern is not provided. Choose the (I)nsert routine to set up the JOURNAL DATE, VOLUME, and ISSUE/PART/SUPPLEMENT for each journal issue. However, be sure to answer NO at the prompt "Do you want to check-in x copies of XXX 19XX issue today? YES//." This prompt will appear for each issue inserted. *****WARNING***** Do not use advance insertion for a title which should be predicting. You will cause duplicates of the same issue date to appear on your check-in screen. To determine if a title has a prediction pattern, exit Check-in, type ^^**LTS**, and use **space bar<RET>** to pull up the same title in Library Title Setup option. Look at the title record to see if there is an alphanumeric code in the PREDICTION PATTERN field. If there is, this title has a prediction pattern. Return through the other prompts in LTS until you can exit it. You will then be returned to Check-in.

If you insert issues in advance, the next time you call-up that title for check-in, the Module will automatically ask if check-in is desired for the next due issue. If this is correct, check-in can be accomplished with two keystrokes.

*****HINT***** If you make sure that the next issue date has been inserted in advance for any title which cannot be predicted, then these issue dates will appear on the Missing Issues List (MIL) option (Section X). This will prevent you from having a situation in which a title just stops arriving and the non-receipt of it is not discovered until it is too late for claiming. You do it by inserting the date, the volume and the issue - but answering no to the automatic check-in question. That just leaves the date, the volume, and issue number on the screen, but you have not actually indicated that you received it. The Missing Issues List (MIL) report (Section X) is generated based on ID NUMs actually on the check-in screen for which no DATE RECEIVED has been entered.

It is useful to enter a reminder in the FOR-YOUR-INFORMATION field in Library Title Setup (LTS) option (Section E) such as "INSERT NEXT ISSUE" for titles which don't predict. This reminder will display under these titles each time they are selected in Check-In (CHE) option.

You may have started up with your Serials Module in mid-year or you may acquire back issues of a title out of cycle. You can use the insertion function to insert these issues at any point. The system will put them in the correct order by their JOURNAL DATE regardless of when they are inserted. If you answer the automatic check-in question after each insertion with a YES answer, the DATE RECEIVED will show the date on which you performed the insertion. If you want to create an accurate retrospective check-in file based on previous manual records, you can answer the automatic check-in question with NO. You can then choose the ID NUM of each inserted item in turn, and when prompted for "DATE RECEIVED", enter the actual date of receipt from your old records. For example:

TITLE: MUSCLECARS

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1993	2(1)		1		
2	MAR 1993	2(2)		1		
3	MAY 1993	2(3)		1		
4	JUL 1993	2(4)		1		

Choose: "ID NUM" to check-in, (I)nsert, (E)dit.
Exit//3<RET>

The screen drops into the following subroutine.

TITLE: MUSCLECARS

JOURNAL DATE	V(I)	COPIES ORDERED	COPIES RECEIVED	COPIES COMPLETED
May 1993	2(3)	1		

C	A	T	STATUS	LOCATION	DATE RECEIVED	LIBRARY SITE LOCATION
C1	G		NOT RECEIVED	PATIENTS		LIBRARY

DATE RECEIVED:TODAY// 4/1<RET> (APR 1, 1993)

Enter copy number/s to distribute separated by commas or a hyphen. Copy number/s:EXIT// 1<RET>
C1 RECEIVED.

Check-in completed.
EXIT//<RET>

NOTE A return at "Copy number/s:EXIT" prompt above without a copy number will negate the check-in for this issue.

If you reentered the title at this point, you would see:

TITLE: MUSCLECARS

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1993	2(1)		1		
2	MAR 1993	2(2)		1		
3	MAY 1993	2(3)	APR 1,1993	1	1	ALL
4	JUL 1993	2(4)		1		

Exit//<RET>

Insertion is also used to enter a variety of unusual, unpredicted, or unnumbered JOURNAL DATES and ISSUE/PART SUPPLEMENTS into the check-in sequence. For example, you can insert items such as:

TITLE: MUSCLECARS

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1993	2(1)	JAN 3,1993	1	1	ALL
2	MAR 1,1993	2(2-SUPP)	APR 1,1993	1	1	ALL
3	MAY 1993	(SUMM)	APR 1,1993	1	1	ALL
4	JUL 1993	2(4)	AUG 9,1993	1	1	ALL
5	SEP 15,1993	2(EXTRA)	OCT 1,1993	1	1	ALL

Exit// <RET>

If an issue is identified by ID NUM for check-in out of sequence, the system will again ask for specific "DATE RECEIVED" and the specific copy numbers received at that point. Remember that a return at this field without a copy number will negate the check-in for this issue.

Use E(ID NUM) function to (E)dit the JOURNAL DATE, VOLUME, and ISSUE/PART/SUPPLEMENT fields, as well as ENTRY TYPE, ISSUE STATUS, and DATE RECEIVED of a copy of an issue.

A JOURNAL DATE may be altered through (E)diting but may not be deleted at this point in Check-In (CHE) option. If there is an unneeded or erroneous JOURNAL DATE already created which you wish to remove from Check-In (CHE) option, use the Purge Journal Date/s from a Title (PUR) option (Section M) in Serials Management (LSM) option (Section C) to remove this ID NUM.

A VOLUME number may be edited or deleted.

An ISSUE/PART/SUPPLEMENT entry may be edited or deleted.

Do not edit the COPIES ORDERED field.

TYPE governs whether or not the title will predict, if a prediction pattern is present. If a title has a prediction pattern, and you believe it should be predicting, but it is not, check the ENTRY TYPE for the last several ID NUMs on the screen. They may have somehow been changed to an "I". You will need to change them, especially the last one, to a "P" for "predicted".

Use a ? at the "Select COPY OF ISSUE" prompt to list the specific copies and Table of Contents (ToC) for a JOURNAL DATE. Input the correct copy number. Do not enter one which is not listed.

A ? at the "ISSUE STATUS" prompt then displays five CHOICES.

- 1 ROUTED
- 2 ROUTED (TO RETURN)
- 3 SHELVED
- 4 NOT RECEIVED
- 5 TOC NOT RECEIVED

Select 1, 2, or 3 to change the routed, routed to return, or shelved designation of THIS COPY OF THIS ISSUE ONLY. These changes will not affect any other issue or copy, nor will the data in Copy Specific Edit (CSE) (Section F) be altered. If you use this field to route an item not already designated in Copy Specific Edit (CSE) option (Section F) as ROUTED or ROUTED TO RETURN, routing slips will not be automatically generated and will have to be made manually.

A choice of 1, 2, or 3 will also allow a change in the DATE RECEIVED field to be visible in History of Check-In (HIS) (Section U) for this copy, but this change will not be visible on the main Check-In (CHE) option screen.

The @ delete mark will not work in the DATE RECEIVED field. Instead, use choice 4 - NOT RECEIVED-under ROUTING STATUS to indicate non-receipt of a copy of an issue or 5 - ToC NOT RECEIVED to indicate non-printing of routing slips for a table of contents. To quickly reprint a few routing slips in case of printer failure, you can use choice 4 and 5 here to negate the check-in of specific issues. When you then check them in again, the routing slips will also be regenerated.

If all copies of an issue are marked NOT RECEIVED, the DATE RECEIVED column of the main check-in screen will be emptied. If appropriate, the issue may then be checked-in again with a new DATE RECEIVED by choosing the ID NUM, and the DATE RECEIVED column on the main screen in Check-In (CHE) option will be accurate.

The Check-In (CHE) option screen normally displays the most current five issue dates. Use **(B)**ackup to display the previous five journal dates. Or enter **B(ID NUM)** to start at a specific journal date to see five journal dates in forward sequence from that date. Use **(F)**orward to display the next five journal dates. Or enter **F(ID NUM)** to start at that journal date and see five journal dates forward in sequence from that date. B and F will display only if there are listed issues before or after what is displayed on the immediate screen.

Use **N** to see (N)otes about a title which were created in the CHECK-IN NOTES field in Library Title Setup (LTS) option (Section E).

If you ordered multiple copies of the title and not all copies were received at the same time for an issue date, answer the question "Do you want to check-in X copies of XXXXXX issue today? YES//" with **NO**.

The system will ask for the ID NUM of the issue to be checked-in. It then asks for DATE RECEIVED:TODAY. An earlier receipt date may be input at this prompt if appropriate.

It then states: "Enter copy number/s to distribute separated by commas or a hyphen. Copy number/s:EXIT//" ***REMINDER*** Be sure to input copy numbers. A return at this prompt without a copy number will negate the check-in for this issue.

For example:

TITLE:GUT<RET>

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
4	APR 1988	1(4)	APR 5,1988	2	2	ALL
5	MAY 1988	1(5)		2		

Do you want to check-in 2 copies of MAY 1988 issue today? YES//
NO<RET>

The screen repaints:

TITLE: GUT

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
4	APR 1988	1(4)	APR 5,1988	2	2	ALL
5	MAY 1988	1(5)		2		

Choose: "ID NUM" to check-in, (I)nsert, (E)dit, (B)ackup.
Exit//5<RET>

The screen drops into the following subroutine:

TITLE: GUT

JOURNAL DATE	V(I)	COPIES ORDERED	COPIES RECEIVED	COPIES COMPLETED
May 1988	1(2)	2		

C A T	STATUS	LOCATION	DATE RECEIVED	LIBRARY SITE LOCATION
C1	M	NOT RECEIVED	MEDICAL LIBRARY	TOGUS

DATE RECEIVED:TODAY// 4/1<RET> (APR 1, 1988)

Enter copy number/s to distribute separated by commas or a hyphen. Copy number/s:EXIT// 1<RET>
C1 RECEIVED.
Check-in completed.
EXIT//<RET>

NOTE A return at the "Copy number/s:EXIT" prompt above without a copy number will negate the check-in for this issue.

If you reenter the title at this point, you will see:

TITLE: GUT

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
4	APR 1988	1(4)	APR 5,1988	2	2	ALL
5	MAY 1988	1(5)	APR 1, 1988	2	1	1,

Choose: "ID NUM" to check-in, (I)nsert, (E)dit, (B)ackup.
Exit//

When the other copy arrives, you will select the title again, then select the ID NUM, and enter the DATE RECEIVED and appropriate copy number for the current arrival. The screen will then display changes in the CPY'S RCV'D and DISPOSITION COMPLETED columns.

In Library Site Parameters (LSP) option (Section B), you were instructed to identify a separately ported printer to be used for the printing of routing slips as well as reports. If you are unable to utilize a ported printer and must use a slaved printer for routing slips, you will see a "DEVICE" prompt after you have answered the automatic check-in question. Before entering a <RET> at the "DEVICE" prompt, toggle your slaved printer on. Then enter a <RET> and another <RET> again at the "RIGHT MARGIN" prompt. It will print the routing slip to the screen for you. The routing slips flow across your screen. You will have to capture them with your print-screen key or toggle your slaved printer on and off. For example:

TITLE: GUT

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
1	JAN 1988	2(1)		1		

Do you want to check-in 1 copies of JAN 1988 issue today? YES// <RET> c1
RECEIVED
ToC ROUTING LIST

Check-in completed.

DEVICE:<RET> DecServer RIGHT MARGIN: 80//<RET>

Veterans Administration ROUTING SLIP

ROUTE TO:

SCU PAGE, MELDA/SPECIAL CARE UNIT

GUT
JAN 1988 2(1)
TABLE of CONTENTS ROUTING SLIP

FROM LIBRARY, 142D

FEB 1,1988

Continue//<RET>

EXIT//<RET>

When you have adjusted additional copies in Copy Specific Edit (CSE) option (Section F) with START DATES and STOP DATES, the check-in screens will reflect those changes with the next ID NUM to be placed on the screen after the change has been made. Changes concerning numbers of copies cannot be made to ID NUMs already listed on the screen. You may need to use Purge Journal Date/s from a Title (PUR) option (Section M) to delete some ID NUMs. Make your copy changes in Copy Specific Edit (CSE) option (Section F), and then reenter Check-In (CHE) option to repredict or reinsert JOURNAL DATES to get the correct number of copies indicated for a particular issue.

In this version, the initialization process has made all the titles remaining in your database "active" titles, meaning that they are reachable in this Check-In (CHE) option. However, a number of these titles are actually the "formerly" titles of your current subscriptions. You don't need to have these "formerly" titles available in the Check-In option. In fact, to keep them there could cause confusion if a number of staff members are performing check-in. It is suggested that you enter the Check-In option and turn on a slaved printer. At the prompt "Select LOCAL SERIALS", enter a **??**. The entire list of titles available in the Check-In option will then print to the slaved printer, one screen at a time. For those which are the "formerly" version of an active or current title, go to Library Title Setup (LTS) option (Section E), and enter **R** for Renamed in the INACTIVE field. This will maintain the title for use in other options such as Holdings Setup (HOL) option (Section G), but will remove it from the Check-In option. Also, each time you download or receive another title from FORUM, if that title has a "formerly" attached to it, it will also bring the "formerly" with it. Again, that "formerly" will be "active" until you render it Renamed at the INACTIVE field.

You may encounter some very old "formerly" titles for which you have never entered any data in any of the options. When these titles are called up in Check-In, you will get the following message.

```
Select LOCAL SERIALS TITLE:  LYING-IN
NO HOLDINGS FOR THIS TITLE
Exit//
```

Section T - RET - Return from Routing

Use Return From Routing (RET) to indicate that a journal issue has been returned from a routing sequence and is ready to be shelved in the library collection. Return From Routing (RET) option is comparable to a second check-in function for those items that you have routed out and are suppose to return to the library. There is a report - Outstanding Routed to Return Issues (ORR) (Section AM) - which will list the issues which have not yet been returned to the library, based on those items in this option which still indicate non-return.

At the "Select LOCAL SERIALS" prompt, select the title of the issue ready for return from routing by entering one of the following. If a numbered list of choices appear, select the correct title by number.

- significant word or word fragment
- ISSN/ISBN number
- NLM title abbreviation
- synonym such as AJN for AMERICAN JOURNAL OF NURSING
- the first few words of the title truncated at the right

After choosing the appropriate ID NUM for the routed journal issue, you are prompted for the copy numbers. See the example below.

TITLE: **JAMA** <RET>

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	COPIES SHELVED
95	DEC 15,1993	270(23)	DEC 14,1993	1	1	
96	DEC 22,1993	270(24)	DEC 21,1993	1	1	
97	JAN 5,1994	271(1)	JAN 6,1994	1	1	

Choose: "ID NUM" to return from routing.

Exit// **96** <RET>

TITLE: JAMA

JOURNAL DATE	V(I)	COPIES ORDERED	COPIES RECEIVED	COPIES SHELVED		
DEC 22,1993	270(24)	1				

C A T	STATUS	LOCATION	DATE RECEIVED	LIBRARY SITE LOCATION
c1	M	ROUTED (TO RETURN)	200 MEDICAL LIB	DEC 21,199 205
ToC	ROUTED		DEC 21,1993	

Enter copy number/s to return separated by commas or a hyphen.
Copy number/s: EXIT// 1 <RET>

If you reenter the title, you will see that the STATUS has been changed to SHELVED, indicating that copy 1 has been returned.

TITLE: JAMA

JOURNAL DATE	V(I)	COPIES ORDERED	COPIES RECEIVED	COPIES SHELVED		
DEC 22,1993	270(24)	1		1		

C A T	STATUS	LOCATION	DATE RECEIVED	LIBRARY SITE LOCATION
c1	M	SHELVED	200 MEDICAL LIB	DEC 21,1993 205
ToC	ROUTED		DEC 21,1993	

NOTE If you RETURN by the prompt, "Enter copy number/s to return separated by commas or a hyphen. Copy number/s: EXIT/" <RET> without entering a copy number, the issue status will not be changed to "shelved".

Section U - HIS - History of Check-In

History of Check-in (HIS) displays detailed information related to receipt and disposition of specific issues. It includes Category and Location data from the Copy Specific Edit (CSE) option (Section F), Status, Date Received, and Library Site Location information for each copy. History of Check-In (HIS) option is exactly like the check-in screen except that you can't perform any operations on these items; they are just for viewing.

At the "Select LOCAL SERIALS" prompt, retrieve the title by entering one of the following. If a numbered list of choices appear, select the correct title by number.

- significant word or word fragment
- ISSN/ISBN number
- NLM title abbreviation
- synonym such as AJN for AMERICAN JOURNAL OF NURSING
- the first few words of the title truncated at the right

For example, you can check on the status of individual issues.

TITLE: **NEWSWEEK**<RET>

ID NUM	JOURNAL DATE	V(I)	DATE RECEIVED	CPY'S ORD'D	CPY'S RCV'D	DISPOSITION COMPLETED
50	DEC 13,1993	122(24)	DEC 9,1993	5	5	ALL
51	DEC 20,1993	122(25)	DEC 15,1993	5	5	ALL
52	DEC 27,1993	122(26)	DEC 23,1993	5	5	ALL
53	JAN 3,1994	123(1)	DEC 29,1993	5	1	1,
54	JAN 10,1994	123(2)	JAN 5,1994	5	1	1,

Choose: "ID NUM" to see history of check-in, (B)ackup.

Exit// **53** <RET>

TITLE: NEWSWEEK

JOURNAL DATE	V(I)	COPIES ORDERED	COPIES RECEIVED	COPIES COMPLETED
- - - JAN 3,1994	123(1)	5	1	1

	C A T	STATUS	LOCATION	DATE RECEIVED	LIBRARY SITE LOCATION
c1	G	SHELVED	PATIENTS LIBRAR	DEC 29,1993	205
c2	G	NOT RECEIVED	PATIENTS LIBRAR		205
c3	G	NOT RECEIVED	PATIENTS LIBRAR		205
c4	G	NOT RECEIVED	PATIENTS LIBRAR		205
c5	G	NOT RECEIVED	PATIENTS LIBRAR		205

EXIT// <RET>

It is more efficient to use History of Check-In (HIS) option to quickly check the availability of an issue or copy than Check-In (CHE) option (Section S). Entering Check-In (CHE) option (Section S) screens repeatedly will often cause the advance prediction of a number of upcoming issues to the Check-In (CHE) option (Section S) screen for a title. You may not wish to have more than one issue ahead showing on a Check-In (CHE) option (Section S) screen.

This History of Check-In (HIS) option is the same option which displays in the Reports for Patron Options (RFP) as History of Check-in (PLH) (Section AS).

Also use History of Check-In (HIS) option with a slaved printer to print the screens for shelf checks prior to purging - Purge Journal Date/s from a Title (PUR) option (Section M).

Section V - RRS - Reprint Routing Slips

The Reprint Routing Slips (RRS) option allows the reprinting of routing slips for a specific time period. This is useful in case of printer malfunction.

Enter the date and time following the prompts for "DATE". Use a **?** to see the correct way to enter date and time information. If you started checking-in at 8 a.m., and discovered by 9 a.m. that your printer had failed, you can enter **T@8:00** at the "FROM date and time" prompt and NOW at the "TO date and time" prompt. At the "DEVICE" prompt, accept the default printer number or name to reprint the routing slips to the usual printer, or insert another printer number or name if necessary. Insert the word **HOME** to view the routing slips only on the screen.

An alternative method to reprint a few routing slips involves using the ability to edit the ISSUE STATUS field for an issue in the Check-In (CHE) option (Section S). To quickly reprint a few routing slips in case of printer failure, you can use choice 4 and 5 at the ISSUE STATUS field to negate the check-in of specific issues. When you then check them in again, the routing slips will also be regenerated.

Section W - STR - Serials Titles Reports

The Serials Titles Reports (STR) menu provides for the creation of numerous reports of interest to library staff; some of which may be printed out and distributed to library patrons. The reports are related to missing issues; the location, format, source, or category of the titles; new titles which were not previously in the Title Authority file; and subscription and cost information by category. Information for these reports is taken from the data entered using the options on the Library Serials Management (LSM) (Section C) and Serials Control (SER) (Section Q) menus of the Serials Module.

The individual reports included in STR are as follows.

MIL	Missing Issues List
AST	ALL Serials Titles
LOC	Local Titles by Location
VEN	Local Titles by Vendor
MFT	Local Microfilm Titles
MED	Local Medical Titles
PAT	Local Patient Titles
ADM	Local Administrative Titles
DON	Local Donor Titles
NLT	New Local Titles
MSC	Medical Subscriptions with Cost
PSC	Local Patient Subscriptions

There are additional reports in the Other Serials Reports (OSR) option (Section AJ).

The process for formatting reports is similar for most of the above options.

At each "START WITH" prompt, enter the first letter or date that should be printed out for a report. At each "GO TO" prompt, enter the last letter or date to be printed out for the report. For example, enter the letter **A<RET>** at the "START WITH VENDOR: FIRST/" prompt and enter **AZ<RET>** at the "GO TO VENDORLAST/" prompt to see those vendors whose names begin with the letter A.

Remember that entering just the initial letter, e.g., B, at the "GO TO" prompt, will only retrieve an item that has the one letter "B" as its title.

At the "START WITH JOURNAL DATE: FIRST//" prompt, enter **1993<RET>** and enter **NOW<RET>** at the "GO TO JOURNAL DATE: LAST//" prompt to see journal issues from the beginning of 1993 to today.

Use the FIRST and LAST defaults at each prompt to get a complete listing of all entries available for the report.

For some reports, it is possible to enter an @ delete at the "START WITH" prompt to include in the report those titles which have no data in the field which is listed after "START WITH". Enter a ? at each "START WITH" prompt to see if this format is available for the report being displayed.

At the question "Do you want DETAILED HOLDINGS listed? YES//", <RET> will print the holdings statements which were entered in the DETAILED HOLDING field in Holdings Setup (HOL) option (Section G). **NO<RET>** to the same question will print the holdings statement from the BRIEF SUMMARY HOLDING field in Holdings Setup (HOL) option (Section G). ***NOTE*** Many libraries will probably use only the BRIEF SUMMARY HOLDING field and leave the DETAILED HOLDING field empty. If this is the case, be sure to enter **NO<RET>** to the above question; otherwise, no holdings statements will print out.

At the "DEVICE" prompt, enter the name or number of the local printer on which the list will be printed. Enter the correct number of characters on a line for the terminal/screen at the "RIGHT MARGIN" prompt. 80 or 132 are the normal line widths.

Some local IRM Managers may prefer to have reports which are not needed urgently queued to print during non-peak use hours. To queue a report, at the "DEVICE" prompt, insert the letter Q. The system will prompt again for device number/name and margin length. Answer as usual. The system will then ask "Requested time to print: NOW//". Use the ? to find out how to enter the correct time and date.

If you do not have access to a separately ported printer and must instead use a slaved printer, at the "DEVICE" prompt first toggle your printer on. Then enter **;;999** at the "DEVICE" prompt. This will allow the report to print in a continuous stream so that you do not have to be present to input <RET> at the end of each page. However, you will have to check on the buffer capacity of your slaved printer.

Section X - MIL - Missing Issues List

Use the Missing Issues (MIL) option to display the issues identified as not yet received from the Check-In (CHE) option (Section S). In order to appear on the Missing Issues List (MIL) option, an issue must have already been predicted to or inserted onto the Check-In (CHE) option (Section S) screen, but not checked-in.

The list will sort alphabetically by the vendor's name. All the individual missing issues for subscriptions placed with that vendor will be arranged alphabetically by title with the oldest missing issue printed first under the title. The volume and issue, ISSN, and date of the issue will also be displayed for each missing copy.

An example of the Missing Issues List follows.

```
MISSING ISSUES LIST
FEB  2,1994  16:46

TITLE
JOURNAL DATE      V(I)  VENDOR      ORDERED  MISSING  ISSN
-----
AAOHN JOURNAL
JAN 1994          42(1)          1          1          0891-0162
c1    NOT RECEIVED  READMORE INC.

ABSTRACTS OF CLINICAL CARE GUIDELINES
JAN 1994          6(1)          1          1          1042-4423
c1    NOT RECEIVED  READMORE INC.

ABSTRACTS OF CLINICAL CARE GUIDELINES
MAR 1994          6(2)          1          1          1042-4423
c1    NOT RECEIVED  READMORE INC.
```

With the Serials Module, you can easily submit claims at any point in time. You can make your list very large or very narrow depending on how you sort it. Most vendors will allow you to print out your list, annotate it if necessary, and fax it to them.

The first prompt for the report is "START WITH VENDOR". You can accept all vendors, or you can range on a section of the alphabet to limit it to one or two vendors. If you know that Carter Periodicals is your major vendor, you can range it from "CARTER" to "CARTERZ" which would pick up all vendors who begin with CARTER.

The second level of prompt is "START WITH LOCAL SERIALS TITLES". You can print all the titles by accepting "FIRST" as the default. It will then print all the titles for your vendor from A to Z. If you want to print just the titles beginning with "J", you would range at this prompt from "J" to "JZ".

The third level of prompt is "START WITH JOURNAL DATE". There are several alternatives with date ranges.

To display a list of all the serials that begin with the letter "J" which had missing issues for a March, 1994 date and were ordered from Carter Periodicals, enter the information as shown in the following example.

```
START WITH VENDOR: FIRST//CA<RET>
GO TO VENDOR: LAST//CB<RET>
START WITH LOCAL SERIALS TITLES: FIRST//J<RET>
GO TO LOCAL SERIALS TITLES: LAST//JZ<RET>
START WITH JOURNAL DATE: FIRST//3/1/94<RET>
GO TO JOURNAL DATE: LAST//4/1/94<RET>
```

Some journals have a JOURNAL DATE of only a year-type date, for example, 1994. At the point where the Missing Issues List (MIL) option asks "START WITH JOURNAL DATE: FIRST//", insert 1994 in order to print out those missing issues with that type of issue date. If you insert 1/1/94 or 1/94 at that point, you will not get the missing issues whose JOURNAL DATE is 1994. While you may not need to do this for each Missing Issues List (MIL) report, you should remember to do it a few times a year to pick up those quarterlies that might have stopped coming.

The "GO TO JOURNAL DATE" entry should, in most cases, be a date about a month earlier than today. Most journals lag behind in their actual receipt dates compared to their cover dates. You do not want a Missing Issues List (MIL) option to send to a vendor issues listed on it which are not really yet overdue.

Section Y - AST - All Serials Titles

All Serials Titles (AST) displays the serials of the local library. It may be used to generate a list to be distributed to patrons as well as for library staff.

The list will be arranged alphabetically by title of the serial and will include the following fields: FORMERLY or CONTINUED BY titles for those serials which have changed their names, ISSN, location and category from the Holdings Setup (HOL) option (Section G), general notes, and microfilm and hardcopy holdings information. All field labels will print whether or not any data is present.

This is the longest and most comprehensive report in the Serials Module. It includes every title that you will have entered into your Serials Module, active and inactive, together with any of the bibliographic and holdings information associated with it. Because it is so long, it definitely is one that you should have queued to print out after normal working hours.

You may range on it alphabetically by the title. It also gives you a choice of printing the detailed or brief holdings statements. An example of this report follows.

Local Serials Title Brief Holdings FEB 2,1994

TITLE: AAOHN JOURNAL
FORMERLY: OCCUPATIONAL HEALTH NURSING
CONTINUED BY:
ISSN: 0891-0162

GENERAL NOTES
CONTINUES: OCCUPATIONAL HEALTH NURSING. OFFICIAL JOURNAL OF THE AMERICAN
ASSOCIATION OF OCCUPATIONAL HEALTH NURSES.

LOCATION: 200 MEDICAL LIBRARY

MICROFILM HOLDINGS

SUMMARY HOLDINGS: V. 34, 1986-

TITLE: ABSTRACTS OF CLINICAL CARE GUIDELINES
FORMERLY:
CONTINUED BY:
ISSN: 1042-4423

GENERAL NOTES

LOCATION: 200 MEDICAL LIBRARY

MICROFILM HOLDINGS

SUMMARY HOLDINGS: V. 5(1), 1993 -

Section Z - LOC - Local Titles by Location

The Local Titles by Location (LOC) option generates a list of the serials in the local collection arranged by the location in which they are housed. This location information is derived from the PLACEMENT field in Holdings Setup (HOL) option (Section G). If a location/placement is not noted in HOL, the title will not appear on this list. All the titles in a location are arranged alphabetically by title with holdings information, ISSN, GENERAL NOTES, and FORMERLY and CONTINUED BY titles displayed. This list may also be distributed to patrons.

An example of the report follows.

Local Serials Brief Title by Location FEB 2,1994

LOCATION: 200 MEDICAL LIBRARY

TITLE: AAOHN JOURNAL

FORMERLY: OCCUPATIONAL HEALTH NURSING

CONTINUED BY:

ISSN: 0891-0162

GENERAL NOTES:

CONTINUES: OCCUPATIONAL HEALTH NURSING. OFFICIAL JOURNAL OF
THE AMERICAN ASSOCIATION OF OCCUPATIONAL HEALTH NURSES.

MICROFILM HOLDINGS:

SUMMARY HOLDINGS: V. 34, 1986-

TITLE: ABSTRACTS OF CLINICAL CARE GUIDELINES

FORMERLY:

CONTINUED BY:

ISSN: 1042-4423

GENERAL NOTES:

MICROFILM HOLDINGS:

SUMMARY HOLDINGS: V. 5(1), 1993-

Section AA - VEN - Local Titles by Vendor

Use the Local Titles by Vendor (VEN) option for an alphabetical list of the subscriptions placed with each vendor used by the library. Under each vendor's name there is an alphabetical listing by title with subscription information. This information includes ISSN, category, number of copies, source of funds, costs (previous year's and current), renewal date and length of subscription. This information must have been entered in Holdings Setup (HOL) (Section G) and Purchasing Information Edit (PIE) (Section H).

THIS REPORT IS NOT CALCULATING CORRECTLY; THUS IT HAS BEEN RENDERED UNAVAILABLE.

Section AB - MFT - Local Microfilm Titles

The Local Microfilm Titles (MFT) option provides for an alphabetical listing of the local microfilm holdings either by title with the microfilm vendor listed under the title **or** by microfilm vendor with the titles arranged alphabetically under the microfilm vendor.

Other information included in the report is the microfilm renewal data and location, both taken from Holdings Setup (HOL) option (Section G). Enter <**RET**> at the "Do you want microfilm holding by titles? YES/" prompt to arrange the list by title. Enter **NO**<**RET**> to have the list displayed by microfilm vendor. You may range alphabetically on both the title and the vendor.

If you have entered any data in the MICROFILM HOLDINGS field in the Holdings Setup (HOL) option (Section G), then those titles will print in this report.

If you wish to have the version of the report that sorts by vendor first and you have titles for which you have not entered a vendor as well as titles for which you have, use a @ mark at the "START WITH MICROFILM VENDOR: FIRST/" prompt. You will then get a list that lists those without a vendor first, followed by those with a vendor.

An example of the report sorted by title follows.

Local Serials Microfilm Holdings FEB 2, 1994

TITLE: ACTA CYTOLOGICA
MICROFILM VENDOR:
RENEWAL DATE (MF):
LOCATION: 200 MEDICAL LIBRARY
MICROFILM HOLDINGS:
V. 8, 1965 - V. 22, 1978

TITLE: AMERICAN JOURNAL OF NURSING
MICROFILM VENDOR: UMI
RENEWAL DATE (MF): DEC 1994
LOCATION: 200 MEDICAL LIBRARY
MICROFILM HOLDINGS:
V. 65, 1965 - V. 84, 1984

An example of the report sorted by vendor follows.

Local Serials Microfilm Vendor holdings

FEB 9,1994

VENDOR: EMPTY

TITLE: ACTA CYTOLOGICA

LOCATION: 200 MEDICAL LIBRARY RENEWAL DATE (MF):

MICROFILM HOLDINGS:

V. 8, 1965 - V. 22, 1978

VENDOR: UMI

TITLE: AMERICAN JOURNAL OF NURSING

LOCATION: 200 MEDICAL LIBRARY RENEWAL DATE (MF): DEC 1994

MICROFILM HOLDINGS:

V. 65, 1965 - V. 84, 1984

Section AC - MED - Local Medical Titles

The Local Medical Titles (MED) option is used to generate a list of those serials which have been designated as "Medical" in the CATEGORY field in Holdings Setup (HOL) option (Section G). The list can be sorted by title or by subject. You can range on sections of the alphabet for both the title and the subject sort. Both of the lists contain holdings and location information and can be distributed to library patrons. Active and inactive titles are included.

The subject list will have all the titles arranged alphabetically under the subject. At the "Do you want MEDICAL JOURNAL HOLDINGS listed by TITLE? YES/" prompt enter <**RET**> for the list to be arranged by titles or **NO**<**RET**> for the list to be displayed by subject.

*****WARNING***** NO TITLES WILL APPEAR ON THIS REPORT IN EITHER VERSION UNLESS INFORMATION HAS BEEN ENTERED IN THE CATEGORY FIELD IN HOLDINGS SETUP (HOL) OPTION (SECTION G). IF SORTED BY SUBJECT, THERE MUST BE A SUBJECT HEADING ASSIGNED FOR THE TITLE IN HOLDINGS SETUP (HOL) OPTION (SECTION G). IF THERE IS NO SUBJECT HEADING, THE TITLE WILL NOT DISPLAY. A NULL SORT UTILIZING THE @ MARK WILL NOT WORK IN THIS OPTION.

An example of the report sorted by title follows.

```
Brief Medical Titles                                FEB  9,1994
-----

TITLE:  DECUBITUS
FORMERLY:
CONTINUED BY:
ISSN:  0898-1655

GENERAL NOTES
A COMPENDIUM OF PREVENTION AND TREATMENT OF PRESSURE ULCERS.

LOCATION:  200 MEDICAL LIBRARY
SUMMARY HOLDINGS:  V. 2(4)< 1989 -
```

An example of the report sorted by subject follows.

Brief Medical Titles by Subject

FEB 9,1994

SUBJECT: ONCOLOGY

TITLE: JOURNAL OF DERMATOLOGIC SURGERY AND ONCOLOGY
FORMERLY: JOURNAL OF DERMATOLOGIC SURGERY
CONTINUED BY:
LOCATION: 200 MEDICAL LIBRARY
SUMMARY HOLDINGS: V. 7, 1981 - V. 16(6), 1990

TITLE: JOURNAL OF PSYCHOSOCIAL ONCOLOGY
FORMERLY:
CONTINUED BY:
LOCATION: 205 MEDICAL LIBRARY
SUMMARY HOLDINGS: V. 2, 1984 - V. 8(4), 1990

Section AD - PAT - Local Patient Titles

Select Local Patient Titles (PAT) to generate an alphabetically arranged list of both active and inactive titles that were assigned a "General" and/or "Patient Health Education" designation at the CATEGORY field in Holdings Setup (HOL) option (Section G). This list includes the FORMERLY and CONTINUED BY titles, ISSN, general notes, category, and holdings information. The lists may be distributed to library patrons.

To display only those titles identified as "Patient Health Education", enter **NO<RET>** at the "Do you want all general and patient health education titles?" prompt.

Entering **YES<RET>** at the "Do you want DETAILED HOLDINGS listed?" prompt will list a complete description of holdings. **NO<RET>** will provide only a brief summary of holdings to be displayed.

If the CATEGORY field in Holdings Setup (HOL) option (Section G) does not have data in it, the title will not print on this report.

An example of the report which contains both general and patient health education title records follows.

Local Patient Brief Holdings FEB 9,1994

TITLE: ALASKA
FORMERLY:
CONTINUED BY:
ISSN: 0002-4562

GENERAL NOTES
FORMERLY: ALASKA SPORTSMAN

CATEGORY: GENERAL

SUMMARY HOLDINGS: CURRENT ISSUE ONLY

TITLE: AMERICAN HEALTH
FORMERLY:
CONTINUED BY:
ISSN: 0730-7004

GENERAL NOTES
ALSO CALLED: AH. ALTERNATE TITLE: FITNESS OF BODY AND MIND.

CATEGORY: PATIENT HEALTH EDUCATION

SUMMARY HOLDINGS: V. 2, 1983-

An example of the report which includes only the patient health education title records follows.

Local Patient Brief Holdings, PHE only FEB 9,1994

TITLE: AMERICAN HEALTH
FORMERLY:
CONTINUED BY:
ISSN: 0730-7004

GENERAL NOTES
ALSO CALLED: AH. ALTERNATE TITLE: FITNESS OF BODY AND MIND.

CATEGORY: PATIENT HEALTH EDUCATION

SUMMARY HOLDINGS: V. 2, 1983-

TITLE: ARTHRITIS TODAY
FORMERLY: NATIONAL ARTHRITIS NEWS
CONTINUED BY:
ISSN: 0890-1120

GENERAL NOTES
FORMERLY: NATIONAL ARTHRITIS NEWS. SUBTITLE: THE MAGAZINE FOR HELP AND HOPE.

CATEGORY: PATIENT HEALTH EDUCATION

SUMMARY HOLDINGS: V. 4(1), 1990-

Section AE - ADM - Local Administrative Titles

Use the Local Administrative Titles (ADM) option for a listing of administrative titles by Service. In order to get an appropriate listing the Service or location must have been entered in the PLACEMENT OF ITEM field in Copy Specific Edit (CSE) option (Section F) for each copy. If nothing has been entered in the PLACEMENT OF ITEM field, you will receive a value of EMPTY on the report if you range at the "START WITH PLACEMENT OF ITEM: FIRST/" prompt with a @ mark.

The individual titles are alphabetized under the location/Service. The ISSN, number of copies ordered, unit cost, and total cost will appear under each title.

This listing may be used at renewal time to assist Services concerning renewal/cancellation decisions relating to their administrative periodicals.

You can range alphabetically at both the "START WITH PLACEMENT OF ITEM: FIRST/" prompt and the "START WITH TITLE: FIRST/" prompt.

An example of the report follows.

```
Administrative Titles                      FEB 9,1994
-----
CATEGORY OF COPY: ADMINISTRATIVE
PLACEMENT OF ITEM:  EMPTY

TITLE: HEALTH DEVICES ALERTS, IMPLANTS
ISSN: 0163-0458
COPIES ORDERED:    1          UNIT COST:
TOTAL COST:                0.00
PLACEMENT OF ITEM: 3 NORTH

TITLE: TV GUIDE
ISSN: 0039-8543
COPIES ORDERED:   14          UNIT COST:   17.33
TOTAL COST:                267.71
```

Section AF - DON - Local Donor Titles

Use Local Donor Titles (DON) to display a list of those individuals or organizations who have donated serials to the library. The name of the donor will be followed by an alphabetical list of the journal titles donated.

In Copy Specific Edit (CSE) option (Section F), if you answer the GIFT field prompt with "yes", you are then asked the DONOR field.

This report sorts by the donor if you have assigned a donor to a copy of the title. If you answered the GIFT field with a YES, but did not enter a donor, you can retrieve a list of those items where a donor is not specified if you enter a @ mark at the "START WITH DONOR: FIRST//" prompt. The report will list the donor as EMPTY.

An example of the report follows.

```
Titles by Donor                                FEB  9,1994
-----
                                DONOR: EMPTY
TITLE: ACADEMIC MEDICINE
TITLE: ACCESS TO WANG
TITLE: ACP JOURNAL CLUB
TITLE: ACTA CHIRURGICA SCANDINAVICA
                                DONOR: CLARK, NANCY
TITLE: AMERICAN PSYCHOLOGIST
                                DONOR: PAGE, MELDA
TITLE: MILITARY MEDICINE
TITLE: NUTRITION AND THE MD
```

Section AG - NLT - New Local Titles

This report will list those title records which you have created locally and for which you have NOT downloaded the corresponding records which would have overwritten them (see Section E) from the national database.

You may use this report to provide you with a reminder list of those local title records for which you need to download the national record.

An example of the report follows.

New Local Titles FEB 2,1994

TITLE: ACCESS TO WANG
FORMERLY:
CONTINUED BY:
SERLINE IDENTIFIER:
PUBLISHER: DATA BASE PUBLICATIONS
NLM TITLE ABBREVIATION:

FIRST ISSUE:
LAST ISSUE:
INDEXED:
GENERAL NOTES

TITLE: ACP JOURNAL CLUB
FORMERLY:
CONTINUED BY:
SERLINE IDENTIFIER: SR0070319
PUBLISHER: AMERICAN COLLEGE OF PHYSICIANS
NLM TITLE ABBREVIATION:

FIRST ISSUE: 114,SUPPL. 1 JAN/FEB 1991 -
LAST ISSUE:
INDEXED: BIOLOGICAL ABSTRACTS
CHEMICAL ABSTRACTS
GENERAL NOTES
SUPPLEMENT TO: ANNALS OF INTERNAL MEDICINE

TITLE: ANNALS OF ALLERGY
LOCATION: 200 MEDICAL LIBRARY REQUESTOR:
COPIES ORDERED: 1 UNIT COST:
TOTAL COST: 0.00

Section AI - PSC - Local Patient Subscriptions

Local Patient Subscriptions (PSC) generates a report of the active subscriptions for all the local titles designated as G (GENERAL) or PHE (Patient Health Education) at the CATEGORY field in Holdings Setup (HOL) option (Section G). The information displayed includes the title, category, and number of copies ordered, sorted alphabetically by the title.

If there is no data entered in the CATEGORY field in Holdings Setup (HOL) option (Section G), the title will not be listed on this report.

This report includes both gift and paid subscriptions which have not been rendered inactive at the INACTIVE field in Library Title Setup (LTS) option (Section E).

An example of the report follows.

```
Patient Titles Available                FEB  2,1994
-----

TITLE: ALASKA
CATEGORY: GENERAL
COPIES ORDERED:  1

TITLE: AMERICAN HEALTH
CATEGORY: PATIENT HEALTH EDUCATION
COPIES ORDERED:  1
```

Section AJ - OSR - Other Serials Reports

This group of reports, Other Serials Reports (OSR) option, provides information on the status of individual issues which have been routed, titles to be renewed, gaps in the collection, holdings listed in union lists, titles routed and their recipients, titles for which the local library has special instructions or notes on their distribution or processing, and serials workload statistics.

The reports included in this option are as follows.

DFR	Titles Due for Renewal (Section AK)
GAP	Local Gaps List (Section AL)
ORR	Outstanding Routed to Return Issues (Section AM)
REC	List of Recipients (Section AN)
TUL	Titles by Union Lists (Section AO)
FYI	For-Your-Information Titles (Section AP)
ATR	Administrative Titles with Recipients (Section AQ)
MSR	Library Monthly Statistical Report (Section AR)

Please see the Serials Titles Report (STR) option (Section W) for information on formatting reports.

Section AK - DFR - Titles Due for Renewal

Titles Due For Renewal (DFR) lists those current subscriptions which are due to be renewed. The list is alphabetized by title and gives the following information: ISSN and file portion taken from Library Title Setup (LTS) option (Section E), vendor and number of copies taken from Copy Specific Edit (CSE) option (Section F), and placement, renewal date, and length of the present subscription taken from Holdings Setup (HOL) option (Section G). The renewal date field does not require a value in it for the title to print. The list will be produced automatically. There are no sort prompts, thus you cannot print only a section of the alphabet.

There is an error in formulation in this report, and thus it is not particularly useful at this time. This report may be rendered unavailable at your site.

An example of this report follows.

```
TITLES DUES FOR RENEWAL                FEB 18,1994
-----

TITLE:  AAOHN JOURNAL
ISSN: 0891-0162                      VENDOR: READMORE INC.
PLACEMENT: 200 MEDICAL LIBRARY
                                           RENEWAL
DATE (HC):
SUBSCRIPTION PERIOD: 1.0      NUMBER OF COPIES: 2
PORTION OF FILE: NATIONAL

TITLE:  ACCESS TO WANG
ISSN: 1052-6366                      VENDOR:
PLACEMENT:                                           RENEWAL
DATE (HC):
SUBSCRIPTION PERIOD:          NUMBER OF COPIES: 1
PORTION OF FILE: LOCAL
```

Section AL - GAP - Local Gaps List

Local Gaps List (GAPS) will print out a list by title of all your serials, active and inactive. If you have entered data in the GAPS field in the Holdings Setup (HOL) option (Section G), that data will display on this report.

There are no sort prompts for this report. The list will automatically be arranged with all numeric titles first followed by all other titles in alphabetic order.

This report may be useful for comparison to surplus lists from other libraries.

An example of this report follows.

Local Gaps List

FEB 2,1994

TITLE: AAOHN JOURNAL

GAPS:

TITLE: ACTA CHIRURGICA SCANDINAVICA

GAPS:

V. 137, 1971

V. 150(1), 1984

V. 150(3), 1984

V. 151(6), 1985

Section AM - ORR - Outstanding Routed to Return Issues

The individual issues which have been routed and are yet to be returned to the library will be displayed in Outstanding Routed to Return Titles (ORR) option. The entries will display alphabetically by title, with copy number, date the issue was initially routed, the recipients to whom it was routed, and volume and issue numbers also shown.

The ORR report displays those issues which have not been indicated as returned (or re-checked-in) in the Routed to Return (RET) option (Section T). You initially chose "routed to return" as the COPY DISPOSITION in the Copy Specific Edit (CSE) option (Section F) for these titles/copies. This report will help you track the issues which have not been returned to the library.

An example of the report follows.

Outstanding Routed-To-Return Titles FEB 2,1994

TITLE: AMERICAN JOURNAL OF SURGICAL PATHOLOGY
COPY NUMBER: 1 ROUTED DATE: JAN 2,1992

RECIPIENT(S): LABORATORY
 LEARNING RESOURCES SERVICE
VOLUME: 16 ISSUE: 2

TITLE: ANNALS OF PHARMACOTHERAPY
COPY NUMBER: 1 ROUTED DATE: OCT 5,1993

RECIPIENT(S): PHARMACY SERVICE
 LEARNING RESOURCES SERVICE
VOLUME: 27 ISSUE: 9

Section AN - REC - List of Recipients

You can produce three differently formatted reports using the List of Recipients (REC) option.

Accepting the YES default at the "Do you want a list of recipients arranged by titles?" prompt will display an alphabetic list of titles with all the recipients of the title. You can also range alphabetically on the titles.

For example, if you want a list arranged first by title and then listing the recipients of both copies and ToCs underneath each title, for titles that begin with A through AD:

```
Do you want a list of recipients arranged by titles? YES// <RET>
START WITH LOCAL SERIALS TITLE: FIRST// A<RET>
GO TO LOCAL SERIALS TITLE: LAST// AD<RET>
START WITH COPY NUMBER OR ToC: FIRST// <RET>
```

You will receive a listing like this.

```
Recipients List by Title                                FEB 17,1994
-----

TITLE: AAOHN JOURNAL
COPY #: 1
RECIPIENTS: PAGE,MELDA                                ROUTING ORDER: 1.00
             CLARK,NANCY                               ROUTING ORDER: 2.00

COPY #: ToC
RECIPIENTS: RED,WHITE                                ROUTING ORDER: 1.00
             GREEN,BLUE                               ROUTING ORDER: 2.00

TITLE: ABSTRACTS OF CLINICAL CARE GUIDELINES
COPY #: ToC
RECIPIENTS: BROWN,BLUE                                ROUTING ORDER: 1.00
             YELLOW,ORANGE                             ROUTING ORDER: 2.00
             PURPLE,WHITE                              ROUTING ORDER: 3.00
```

This report is useful if you have cancelled a title and need to delete all the recipients of copies and issues from it. It is also useful if the title has changed its name, and thus you need to establish the same routings for it under its new name.

NO entered at the question "Do you want a list of recipients arranged by titles?" will generate a list of the individual recipients with all the titles routed to them listed alphabetically under each name. This version is very handy when people are clearing the medical center and you need to remove them from their routings which you had previously established in Copy Specific Edit (CSE) option (see Section F).

If you want a list arranged first by recipient and then listing the titles for which the recipient gets either copies or ToCs underneath each recipient (for recipients whose names begin with C through CZ) see the following example.

```
Do you want a list of recipients arranged by titles? YES// N<RET>
  START WITH TO ROUTE TO: FIRST// C<RET>
  GO TO TO ROUTE TO: LAST// CZ<RET>
```

You will receive a listing that resembles the following.

```
Recipients Receiving Titles                                FEB 17,1994
-----
```

	CLARK, NANCY
COPY #: 1	TITLE: JAMA
COPY #: ToC	TITLE: AMERICAN JOURNAL OF NURSING
COPY #: ToC	TITLE: LANCET
	CURRENT, RED
COPY #: ToC	TITLE: AMERICAN JOURNAL OF CARDIOLOGY
COPY #: ToC	TITLE: AMERICAN JOURNAL OF SURGERY

If you need a list of only the titles for which you generate table of contents routings, enter **YES** at the first prompt, the letter **T** at the "START WITH COPY NUMBER OR ToC" prompt, and accept the LAST default at the "GO TO" prompt to get an alphabetic list of only the Tables of Contents with their recipients.

Section AO - TUL - Titles by Union Lists

Titles by Union Lists (TUL) option refers back to the UNION LIST field in Holdings Setup (HOL) option (Section G) that included multiple codes from which you could choose.

C	CORE
H	HOR
L	LOCAL CONSORTIA
O	OTHER ULP
R	RML
S	STATE
U	UNIQUE
V	VA ULP

If you have utilized this field, you may have this report sorted by any of the various differing union lists to which you may have submitted holdings. This report enables you to keep track of the many union lists to which you may have submitted any one title.

Use this report to display those serials titles which you have indicated are included in these union lists. All the titles with their FORMERLY and CONTINUED BY titles, SERLINE identifier, ISSN, first and last issues, publisher, general notes, and holdings information will be listed alphabetically under the selected union list.

Enter **<RET>** at the "Do you want DETAILED HOLDINGS listed? YES/" prompt to see detailed holdings information. Entering **NO<RET>** will display Brief Holdings information.

At the "START WITH UNION LIST CODE: FIRST/" prompt, enter the initial letter of the code with which you wish to start. At the "GO TO UNION LIST CODE: LAST/" prompt, enter the last two letters of an alphabetical sequence for the point where you wish to stop. For example, to generate this report showing what you have submitted for your RML union list:

```
START WITH UNION LIST CODE: FIRST// R<RET>
GO TO UNION LIST CODE: LAST// RZ<RET>
```

You will then be prompted for the alphabetical segment of the titles you wish.

If you want a list of those titles for which you have not designated a union list code, enter the @ mark at the "START WITH UNION LIST CODE: FIRST//" prompt. You will first get an alphabetical listing under the subheading UNION LIST: EMPTY.

An example of the report follows.

Union List with Brief Holdings FEB 17,1994

UNION LIST: EMPTY

TITLE: ABSTRACTS OF CLINICAL CARE GUIDELINES
FORMERLY:
CONTINUED BY:
ISSN: 1042-4423
FIRST ISSUE: 1N1,JAN/FEB 1989 -
LAST ISSUE:
PUBLISHER: JOINT COMMISSION ON ACCREDITATION OF HEALTHCARE
ORGANIZA...
SERLINE IDENTIFIER: SR0066006

GENERAL NOTES

SUMMARY HOLDINGS: V. 5(1), 1993 -

UNION LIST: LOCAL CONSORTIA ULP

TITLE: ANNALS OF OTOTOLOGY, RHINOLOGY AND LARYNGOLOGY. SUPPLEMENT
FORMERLY:
CONTINUED BY:
ISSN:
FIRST ISSUE: 1,1971 -
LAST ISSUE:
PUBLISHER: ANNALS PUBLISHING CO
SERLINE IDENTIFIER: A35295000

GENERAL NOTES

SUMMARY HOLDINGS: #1, 1971 - #136, 1989; #139, 1989 -

Section AP - FYI - For-Your-Information Titles

For-Your-Information Titles (FYI) will list all those titles for which you entered any local information at the FOR-YOUR-INFORMATION field under Library Title Setup (LTS) option (Section E). The list will include the location and category taken from Holdings Setup (HOL) option (Section G), and the For-Your-Information line. There are no sort prompts for this report.

This is a short report which is useful if you wish to edit your data in the FOR-YOUR-INFORMATION field very quickly. This report prints sorted by the order of the data in the FOR-YOUR-INFORMATION field.

An example of the report follows.

```
Titles with For-Your-Information          FEB  2,1994
-----

TITLE: CLIN-ALERT
LOCATION: PHARMACY
CATEGORY: ADMINISTRATIVE
FOR-YOUR-INFORMATION:
      111

TITLE: FIRE ENGINEERING
LOCATION: ENGINEERING
CATEGORY: ADMINISTRATIVE
FOR-YOUR-INFORMATION:
      138

TITLE: ACTA ENDOCRINOLOGICA
LOCATION: 200 MEDICAL LIBRARY
CATEGORY: MEDICAL
FOR-YOUR-INFORMATION:
      200

TITLE: ACP JOURNAL CLUB
LOCATION: 200 MEDICAL LIBRARY
CATEGORY: MEDICAL
FOR-YOUR-INFORMATION:
      200;INSERT NEXT ISSUE
```


Section AQ - ATR - Administrative Titles with Recipients

For an alphabetical list of all administrative titles with copy number and the recipients of the title, use Administrative Titles with Recipients (ATR). This report is dependent upon the routing information established in Copy Specific Edit (CSE) option (Section F).

This report may be useful at renewal time for administrative journals.

An example of this report follows.

Administrative Titles with Recipients FEB 2,1994

TITLE: AHFS DRUG INFORMATION
COPY #: 35
RECIPIENT: PHARMACY SERVICE

TITLE: AIDS GRAM
COPY #: 2
RECIPIENT: CHEP

TITLE: ALDUS MAGAZINE
COPY #: 1
RECIPIENT: PAGE

Section AR - MSR - Library Monthly Statistical Report

The Library Monthly Statistical Report (MSR) provides a cumulated numerical report on serials activity during a month. The report displays the following.

- the number of issues routed and the number of recipients to which they were routed
- the number of Table of Contents (ToC) routed and the number of recipients for the ToC
- the number of titles which show any check-in activity during the month

At the "DATE" prompt, enter the MONTH for which you wish the report in the form of 12/93 or DEC 93, or use a ? at the prompt to see the acceptable forms for the date. Do not enter a day-type date; you will still get the statistics for the month. If you enter only the year, you will get 0 results on the report.

This report, which you must print to your screen, provides you with accurate workload statistics concerning the volume of your serials check-in work and resultant routings. Some of the data generated here may be useful for your annual and management reports.

Once you purge data for a month, that data will no longer be available for this report.

An example of the report follows.

```
VA Library Network Serials Statistical Report      FEB 17,1994

Please enter the Month and Year for the Statistical Counts Report.

DATE: 2/94<RET>FEB 1994)

ISSUES ROUTED: 125                NUMBER OF RECIPIENTS ROUTED TO: 184

ToC ISSUES ROUTED: 108           NUMBER OF ToC RECIPIENTS ROUTED TO: 501

TITLES WITH CHECK-IN ACTIVITY: 297

Exit// <RET>
```

Section AS - Patron Options

Included in this version of the Serials Module is a menu called LBRY Library Patron Options. These options can be mounted so that they appear on all your local users' menus.

The LBRY Library Patron Options menu includes two main parts.

- PLR Patron Requests for the Local Library (NOT AVAILABLE)
- RFP Reports for Patrons

RFP Reports for Patrons presents three options.

- PLH History of Check-in
- JTA Journal Title Availability Inquiry
- SLJ Subject List of Journals Available

History of Check-In (PLH) is a reiteration of the screen seen in the History of Check-in (HIS) option (Section U). As soon as you have established any check-in data for a title, your patrons will also be able to see it in this PLH option and know if the current issues have been checked in. The display will show the most recently entered titles. The user must enter **(B)**ackup to see earlier entries.

Journal Title Availability Inquiry (JTA) provides information on the complete holdings of a title, including its location taken from the PLACEMENT field in Holdings Setup (HOL) option (Section G) within the medical center. You may print this information to the screen or to a ported printer. The data for this option is taken from what you have input in the Holdings Setup (HOL) option (Section G). If you have not yet entered data into Holdings Setup (HOL) option (Section G), the patron will see nothing but the name of the journal. If you are just starting with the Serials Module and have not yet entered much or any data into Holdings Setup (HOL) option (Section G), you should ask your IRM service to temporarily disable the Journal Title Availability Inquiry (JTA) option. When data is available in this option, the patron can input a title or title fragment. They will see the different kinds of holdings, the placement, its FORMALLY or CONTINUED BY titles, and your retention policy for this title.

Subject List of Journals Available (SLJ) provides a listing of journals by the subject headings which you have assigned. Patrons may print this information to the screen or to a ported printer. If you have not yet created the subject headings in Subject Setup (SUB) option (Section L) nor assigned them to titles in Holdings Setup (HOL) option (Section G), you should also have IRL temporarily disable the Subject List of Journals Available (SLJ) option. This report provides access to a simple list of journals categorized by individual subject headings. You, as well as your patrons, will find it useful. For example, you can present a new nurse with a list of all your nursing journals.

When you have one or more of these options ready to be used, you should create some publicity about them so that users will look for them in their secondary menu. A sample publicity and instructional message follows.

All users may now see information online about all journals/magazines received in Library Service, including: (1) lists by subject; (2) current issue availability; (3) complete retrospective holdings; and (4) locations.

To access this information:

- a. At your main menu, use ?? to pull up your menus.
- b. Select: LBRY Library Patron Options
- c. Then select: RFP Reports for Patrons
- d. You are then presented 3 options:

- PLH History of Check-in
- JTA Journal Title Availability Inquiry
- SLJ Subject List of Journals Available

History of Check-In (PLH) provides current issue check-in data. At the prompt "Select LOCAL SERIALS TITLE", enter a title, the first few characters of a title, a significant or key word from the title, or its abbreviation or acronym. For example, you could use NEJM for New England Journal of Medicine. You will then see a screen showing recent issues, with dates in the DATE RECEIVED column if the issue has been received. If you choose an ID NUM for a specific issue, then the location of that issue is also displayed.

Journal Title Availability Inquiry (JTA) provides information on the complete (station name) holdings of a title as well as its location. At the prompt "Select TITLE AUTHORITY" enter a title, the first few characters of a title, a significant or key word from the title, or its abbreviation or acronym. To print the information to your screen, RETURN at the "DEVICE" prompt. To get a hard copy, insert a printer number or name at the "DEVICE prompt".

Subject List of Journals Available (SLJ) allows you to get a list of all (station name) library journals in specific subject areas. At the prompt "Select SUBJECT NAME", enter a subject or the first few characters of one, such as DIAB for DIABETES MELLITUS. Again, RETURN at "DEVICE" to print to your screen, or insert a printer name or number. You will get a list of all our journal titles in that subject area. If you do not know what subject to use, insert a ? at the "Select SUBJECT NAME" prompt to get a list of all possible subject headings.

Please call or message (librarian's name and extension) if you have questions.

Appendix - Prediction Pattern Form

If you have a journal title where a prediction pattern has changed or needs to be added, please fill out the form below and send it back to Togus accompanied by the following photocopies from the latest issue you have of this title: (1) the cover page, (2) the title page, (3) the table of contents page, (4) any other page with bibliographic information on it, and (5) the spine of the magazine/journal if that is the only place date and volume information appear.

WHEN YOU MAIL THESE, PLEASE STAPLE THE PAGES FOR EACH TITLE IN A BATCH WITH THIS FORM ON TOP.

Please call Togus at 207-623-5773 if you have questions about this form. Thanks so much for your help.

MAIL TO:

CHIEF, LRS (142D)
VA MEDICAL CENTER
TOGUS, ME 04330

STATION NAME:_____ DATE:_____

JOURNAL TITLE:_____ ISSN:_____

1. How many volumes per year does this title have?
2. At what month(s) does the volume number change?
3. When the volume number changes, do the issue numbers reset to 1? YES NO
4. What is the highest number of the numbered issues in the latest completed volume?

5. What is the frequency of this title? Please circle one answer and go to the related questions.

MONTHLY (12 TIMES PER YEAR) go to 6. and 7.)

LESS THAN MONTHLY (AND AN UNUSUAL NUMBER OF MONTHS, LIKE 3,7,8,9,10,11)
(go to 6., 7., 8., & 9.)

MORE THAN MONTHLY (BUT UNUSUAL, LIKE 13, 14, 15, ETC. TIMES PER YEAR) (go to
6., 7., 8., & 9.)

WEEKLY (go to 8. & 10.)

QUARTERLY (go to 11. and 12.)

EVERY TWO MONTHS (go to 11. & 13.)

EVERY TWO WEEKS (go to 8., 14., and 15.)

TWICE A MONTH (go to 8., 14., 15., 16., & 17.)

ANNUALLY

DAILY

CERTAIN DAYS OF THE MONTH (go to 8. & 16.)

ISSUED EVERY X NUMBER OF DAYS (go to 8., 15., & 18.)

OTHER (go to 6., 7., 8., 9., 10., 11., 12., 14., & 15.)

6. In which format are the issues dated? MM/YY MM/DD/YY

7. If MM/DD/YY, what is the day of the month?

8. How many issues per year does it have?

9. For the last 12-month period, please list exactly which months the issues have been dated, with volume number and issue numbers, also:

10. What day of the week is it dated? Please circle:
SUN MON TUES WED THURS FRI SAT

11. Do the issues have a month/year date on them, for example,
April 1988? YES NO

12. If yes, what months? Please circle all appropriate:
JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

13. If yes, please circle one of the three patterns below which indicates the dating pattern of these issues:

1. JAN MAR MAY JUL SEP NOV
2. FEB APR JUN AUG OCT DEC
3. JAN/FEB MAR/APR MAY/JUN JUL/AUG SEP/OCT NOV/DEC

14. Which day of the week? Please circle:
SUN MON TUES WED THURS FRI SAT

15. Please list 12 sequential volume and issue numbers and issue dates for 1989/90, starting with the latest received and working backward:

16. What day(s) of the month, from 1 to 31, are the issues dated? Please circle:

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29
2 30 31

17. Does the title appear to come regularly on certain weeks of the month, for example, first and third? If so, please circle the appropriate weeks:
FIRST SECOND THIRD FOURTH LAST

18. If the title is issued every x number of days, what is the interval?

Glossary

^

Special character referred to as the jump command, up-arrow or caret. This response forces the return to the next higher level in dialogue. The command also allows the user to go from a particular field within an option to another field within the same option, or to "jump" from one menu option to another menu option without having to respond to all prompts in between. To jump to a specific field or option, type an up-arrow (^) and the first few letters of the name of the field or option (e.g., ^Halt will permit the user to halt from any option).

//

see "DEFAULT"

@

This character will delete the current value stored in a field and will leave the field empty of data. The computer will ask "Are you sure you want to delete this entry?" to ensure data is not deleted by mistake.

?

The question mark is a special character that the user may enter at any option or prompt to obtain some form of help information from the FileMan system.

ADMINISTRATIVE CATEGORY

Titles purchased by Library Service which are maintained by an individual or office other than the Library Service. These materials must be (1) critical to the successful accomplishment of official duties; and (2) consulted by an individual or office on a daily basis.

ADP

Automated Data Processing

ALPHA-NUMERIC

String of characters and numbers which cannot be all numbers or start with punctuation.

AOBC

American Overseas Book Company is the FY88, 89, & 90 periodical procurement vendor. It is currently the default answer to the Vendor prompt.

ASCII

American Standard Code for Information Interchange. ASCII translates each character on the keyboard into a number. The characters are the letters of the alphabet, the numerals, punctuation characters, and some other special codes.

CAT (CATEGORY)

Refers to a code designating the VALNET type of a journal title (e.g., (M)edical, (G)eneral, (R)esearch, (A)dministrative, (P)atient Health Education).

CONTINUE

See "ENTER"

CORE

1. Any journal title identified by district or regional libraries as being basic to the provision of information at the local level.
2. The collection of VA-developed programs (specific to MAS, Pharmacy Service and Laboratory Service) which are run at VA Medical Centers.

CPU (Central Processing Unit)

The CPU is the "brain" of the entire computer system, executing the instructions in a program by performing simple logical operations at very high speeds.

<CR>

See "ENTER"

CRT (Cathode Ray Tube)

A piece of computer hardware that looks something like a television screen. Also called a Video Display Terminal (VDT).

CURSOR

An image on the screen (generally a vertical or horizontal line or rectangle) which alerts the user that the computer is waiting for a response to an instruction or prompt.

DATA

Information entered for the computer to store and retrieve.

DATA DICTIONARY

A description of file structure and data elements within a file.

DATABASE

A collection of data related to a specific subject, such as the Title Authority file, consisting of different data fields, such as ISSN, National Library of Medicine (NLM) unique identifier number, etc.

DATE or DATE/TIME FIELD

Examples of Valid Dates:

JAN 22 1957 or 22 JAN 57 OR 1/22/57 or 012257

T (for TODAY), T+1 (for TOMORROW), T+2, T+7, etc.

T-1 (for YESTERDAY), T-3W (for 3 WEEKS AGO), etc.

If the year is omitted, the computer uses the CURRENT YEAR.

You may omit the precise day, as: JAN, 1957

DEFAULT

A response or answer inferred and displayed by the computer for the user to accept or override. It is identified by double slash marks (//) immediately following response. This allows the option of accepting the default answer or entering another answer. To accept the default, simply press the enter (or return) key. To change the default answer, type in another response.

DEVICE

1. A hardware input/output component of a computer system (e.g., CRT, printer).
2. The printer to which the file, record, or report is routed. In answer to the "Device:" prompt, simply type the number of the device where it is to print.

DISPOSITION

Action to be taken when a serial copy is received, (e.g., routed, routed and returned, or shelved).

EDIT

To change/modify data stored in a field.

ENTER

Pressing the {continue} or {return} or {enter} key tells the computer to execute the instructions or command to store the information entered.

FIELD

A data element in a file. For example, TITLE and SUBJECT are fields in the Local Serials file.

FILE

A collection of records that all pertain to some particular set of objects or events (e.g., Publisher file, Subject file, Local Serials file).

FILE MANAGER

A set of MUMPS routines used to create/modify files; enter, edit, print and sort/search related data in files; generate reports; and document file structures. This database manager is also referred to as FileMan (FM).

FREE TEXT

1. A string of characters which may contain any combination of numbers, letters, and/or symbols in the ASCII character set.
2. One of several types of fields in FileMan, composed as above, and with a minimum and maximum number of allowable characters for field length.

FUNCTION

Routines provided to accomplish a particular operation.

HALT

A command entered at any Select XXXXXXXXXX Option prompt to exit the computer system.

HARDWARE

The physical or mechanical components of a computer system such as CPU, CRT, disk drives, etc.

HOR (Holder of Record)

The VALNET library designated within a medical district or region to house specific periodical titles necessary for filling ILL requests, as determined by participating Library Services. The site will acquire, maintain, and lend/photocopy current and retrospective issues/articles from these titles.

HOSPITAL SERVICE FILE (HSF)

Records for defining the persons and/or locations within the medical center. Needs to include entries for sections or subsections, such as Nursing Education, SPD, wards, units, etc.

ID NUM

Identification number assigned to each serial's issue listed in chronological order; used for actions concerning specific issues.

INACTIVE

Term used to designate that the serial title has been cancelled, ceased publication, or renamed but is still maintained in the collection.

INDEXED FIELD

Field for entering indexing sources for titles (e.g., Abridged Index Medicus (AIM), Excerpta Medica (EM), Index to Dental Literature (IDL).

INTEGRATED AUTOMATED LIBRARY SYSTEM

A system in which all automated library functions are processed against a single master bibliographic file. The first module in the VA ILS system is the Serials Control Module.

ISSN (International Standard Serial Number)

A unique identifier assigned to each serial publication. The nine-character code consists of four numerical digits, a hyphen, and four more digits (the last character may be the letter X).

ITEM PLACEMENT LOCATION (IPL)

Indicates actual location of a serial title (e.g., Medical Library, Workroom, Research, etc.). Services holding administrative titles should be included in this file.

JOURNAL DATE

Refers to the journal issue date as it is printed on the journal issue.

KERNEL

A set of software utilities. These facilities provide data processing support for the application packages developed within the VA. They are also tools used in configuring the local computer site to meet the particular needs of the hospital. The components of this operating system include: File Manager, Menu Manager, Task Manager, Mailman, Device Handler, Log-on/Security, and other specialized routines.

KEYWORD

A significant word contained in a journal title which may be used to retrieve a specific record.

LIBRARY SERIALS FILE

The local database of titles which, when created, allows check-in, the establishment of holdings and purchasing data, and the production of reports and statistics.

MDP

Mail Delivery Point; such as 142D, 136, etc.

MENU

A set of options or functions available for users to choose for editing, formatting, generating reports, etc. For example, after logon, a user might have a first or main menu of:

- MailMan
- Library Management
- Patient Inquiry
- Library Patron Options

MENU MANAGER

A part of the Kernel that allows each site to manage the various options or functions available to individual users.

MODEM

An electronic device to communicate with other computers. The modem translates the computer's language into tones of different frequencies that are then transmitted across telephone lines.

MODULE

A part of an integrated package which can be used independently of the total program (e.g., the Serials Module as a subset of the integrated library system).

MULTIPLE FIELD

A field, as defined in FileMan, that can be assigned more than one value at the same time. Multiple fields are always preceded by the word "Select..."

MUMPS

Massachusetts General Hospital Utility MultiProgramming System. This is the computer language the Library Serials Module is written in.

NAME ENTRIES FILE (NME)

A file of names of 1) persons and/or locations used for routing within the library package 2) requestors and 3) donors.

OPERATING SYSTEM

The innermost layer of software that communicates with the hardware. It controls the overall operations of the computer, such as assigning places in memory, processing input, and output. One of its primary functions is interpreting MUMPS computer programs into language the hardware can understand.

OPTION

A routine that is invoked by the user.

OVERRIDE

To write new data to a field, thus replacing the existing data.

PACKAGE

A set of MUMPS routines, files, documentation, and installation procedures that support a specific function (e.g., ADT System, Library System, etc.)

PLACEMENT

Identifies where the journal will be kept after check-in and/or routing. It refers to Item Placement Location (IPL).

PORT

An outlet in the back of the computer into which terminals and other peripheral hardware can be connected.

PROGRAM

A set of MUMPS commands and arguments; created, stored, and retrieved as a single unit in MUMPS.

PROMPT

The question or statement (e.g., "Select...") displayed by the computer which requires a response from the user.

QUEUING

The scheduling of a process/task to occur at a later time. Queuing is normally done if a task takes a lengthy amount of computer time to process. Usually this is done in conjunction with printing and is scheduled after normal business hours.

RETURN

See "ENTER"

ROUTINE

In MUMPS, a computer program is referred to as a routine.

SERIALS CONTROL MODULE

One section of the integrated library system which includes full bibliographic and holdings information for each serial title, as well as binding, claiming, check-in, routing, funding source information, and reports.

SERLINE

SERIALS onLINE. File maintained by the National Library of Medicine (NLM) containing bibliographic records of biomedical serials.

SITE MANAGER

The one person who takes responsibility for the control and management of computer resources at each medical center. Site managers have certain responsibilities both prior to the installation of computer equipment and after the system is fully operational.

SITE PARAMETERS

Refers to specific characteristics in the system that can be modified to meet the needs of individual locations.

STOPWORD

A term which has been designated as unsearchable. For example: of, in, the, etc.

TASK MANAGER

A part of Kernel which allows programs or functions to begin at specified times or when devices become available. See "QUEUEING".

TITLE AUTHORITY FILE (TAF)

Database of titles with bibliographic information taken from the VA Union List of Periodicals with selected general titles added.

ToC (Table of Contents)

Refers to Table of Contents Service in which library routes a photocopy of a journal's table of contents to interested staff.

UCMP

Union Catalog of Medical Periodicals of the Medical Library Center of New York. Facilitates resource sharing among libraries by maintaining records of the holdings for various libraries and by publishing union lists.

ULRICH's

Annual publication (Bowker) listing periodicals published throughout the world; includes titles which have ceased or suspended publication. Entries are classified by subject and include bibliographic information.

UNION LIST

A bibliographic listing of books, journals, and/or AVs from several libraries which are available for loan. This listing also includes information on the holdings of each library.

VDT (Video Display Terminal)

See "CRT"

VENDOR

The source from which a journal is ordered, e.g., AOBC.

WORD FRAGMENT

The truncation of a word, usually done to allow for variant endings and plurals.

WORD-PROCESSING FIELD

Data is entered using individual input lines rather than whole blocks of text. There is no pre-established format for the text. Text is typed in response to the numbered prompts (1>, 2>, 3>). Each prompt represents a line of text. Lines of text entered will not necessarily display the same way on the computer screen or when printed. This means that the format on the screen as the user enters the text is not the same as when it prints on a printer or at a terminal. After entering the text, the Module will provide several editing and formatting options.